Clickand**Build**

v5.0

User Guide

Contents

1   Introduction

Welcome to Click and Build a feature rich, flexible and cost effective way to build a fully trading on-line store for both local and global trading.

Click and Build is an easy to use e-commerce web site construction tool. Designed for business people with little or no technical skills, it constructs even the most complex stores quickly and easily.

It has built-in integration for WorldPay's (http://www.worldpay.com) secure multi-currency pricing and payment gateway as well as many other features required by businesses looking to trade on the Internet. These include; stock control, order processing, tax, shipping, discounting, key event emailing and reporting. It enables you to offer thousands of products in a store and provides the facilities for you to change the look and feel of your store to suit your individual or corporate needs. Please refer to Appendix G for a complete list of the Click and Build features.

Store building and administration is completed on-line using a standard Internet connection and a web browser. No software needs to be installed on your computer.

Click and Build is truly 'International', which means that your shoppers can shop in their own currency (provided you have subscribed to the required currency via WorldPay) secure in the knowledge that shoppers will only have the price displayed deducted from their debit or credit card, with no hidden conversion charges. Tax and shipping has also been designed with cross border trading in mind.

1.1   About This Guide

This guide is presented in three main sections:

- Overview
- Store Build Reference Sections
- Appendices

We recommend that you do read the **Overview** as this will introduce you to some important considerations for trading on-line and as such will have a bearing on the text you enter, the choices you make and the way you build your store. It is also recommended that you undertake the preparation outlined and make reference to the 'Reference' sections as required.

Some of the Click and Build settings are optional and you may wish to skip the sections that you consider irrelevant to your business (e.g. 'Discounting' etc.). Your store will always adopt defaults and operate correctly.

2   Overview

2.1   Store Status

Click and Build has been developed to provide an easy-to-use interface that enables users to manage and design a well-constructed and functional store. Click and Build is an on-line program therefore you only need a browser and Internet connection to develop your store.

Your Click and Build store can be set-up in a number of modes:

- **Brochure** – Your store can display your products and prices but will not have any e-commerce functions, i.e. no shopping cart, tax, shipping, stock control or payment gateway connection.

- **Test** – Provides your store with full e-commerce functionality but the payment gateway will only allow test transactions i.e. no money will be debited from any card used in the transaction.

- **Live** - Provides your store with full e-commerce functionality with an operating integration to the payment gateway enabling your store to trade on-line in a live environment.

A brochure store can easily be converted to a **Test/Live** site by obtaining a WorldPay account. Apply from http://www.clickandbuild.com

2.2   The Structure of Click and Build

Click and Build allows you to select almost every aspect of your store ranging from design layout and product catalogue to specifying complex shipping rates. You create the store in easy stages by simply adding or changing information as requested. Each Click and Build page seen by the shopper is produced using a template that you select and modify.

Click and Build's standard store building functions are simple, flexible and capable of thousands of permutations, all presented in a step-by-step approach. Although HTML is NOT a requirement, Click and Build can incorporate HTML code to produce a customised store if required.

The Click and Build design service is always on hand if you require any design/template creation on your store. This can range from simple logo designs to a complete bespoke store build if required.

Please look at http://www.clickandbuild.com or email design@clickandbuild.com for more information on design work.

3   Planning & Preparation Considerations

Building a store involves a sequence of steps that require you to provide specific information at each stage. We recommend that you collate all the information surrounding your business and the products that you intend to sell prior to commencing any work within Click and Build. An outline of the preparation and information required is provided below:

3.1   Images

The use of images will enhance the visual appeal of your store as well as improving its functionality. Click and Build provides you with a large library of images from which you can choose the screen 'Header' (the top of all your store pages) and the screen 'Theme' (the side of the appropriate store pages).

You will also need to create a library of images for your:

- Company logo (optional)
- Product thumbnail images for short product description
- Product large images for long product description (optional)

In addition, you may decide to use images for navigation links and/or product categories, although Click and Build will automatically generate 'text' for the links.

Start by gathering together your images of products, logos, navigation buttons (if required) and any other images that will become part of your store. GIF and JPG image formats are supported (see below).

Click and Build uses image descriptions for reporting purposes and (by default) uses the **file names** as the **Tool Tip** (shown when shoppers mouse over the image). These can be changed but if you make your file names as descriptive as possible you will not need to amend the **Tool Tip**.

Click and Build enables you to upload a Zip file containing many images. This speeds up the build process enormously and is recommended if you have many product images.

Note: Working with JPG and GIF images
JPG/JPEG files are preferable for images of higher resolution and colour depths such as photographs. When saving JPG files in a graphics application you will have the option to adjust the compression setting. If you use a high compression setting, the resulting file size will be smaller and faster to send to the shopper's browser, however, the viewed quality of the image will be lower. Experiment to find the highest compression setting that retains the level of quality needed.

GIF files are preferable for images with less than 256 colours such as logos, navigation buttons, charts and graphs, etc.

Keep the image size to a sensible minimum and crop your images so that there is no spare "white space" surrounding them. As Click and Build is designed to be displayed on a screen set to 800 x 600 you will need to estimate how large your images will appear to your shoppers.

> **Tip:** An image of 65 pixels wide will appear to be around an inch wide for shoppers using a 15" screen display. We recommend that your product thumbnail images should be around 100 x 100 pixels and your large product image should be around 250 x 250 pixels.

If you require our help or advice with the production of thumbnail and product images, or logo design or 'Header' images please email design@clickandbuild.com

3.2   Your Products

Check that the descriptions and variations (e.g. different product sizes, colours etc.) of your products are meaningful and consistent for your markets as products like clothing and shoes vary widely in size classifications. Some of the most common variations of products are laid out in *Appendix B.* All weights and measurement units will also need to be understandable in all of your markets.

For each product decide on the approach/content/value of the following parameters:

- **Short description** – to identify the product and the optional small image (thumbnail) to accompany this.
- **Long description** – that fully describes the product, perhaps including a detailed manufacturers' specification and the optional large image to accompany this.
- **Product shipping** – included in price or calculated separately? If so, is it by weight, basket value, per unit etc.
- **Product price** – is this to include tax or is tax to be calculated separately and added at the checkout stage?
- **Stock tracking function (optional)** – indicate if an item has stock control or not. Will you use this? If so, for each product you will need:
  o The current stock levels
  o The re-order level (when an automated email will be sent to inform low stock position).
- **Product variations** – do your product lines have variations in price or stock that need to be catered for? E.g. colours, sizes etc.
- **Shopper attributes** – will you require shoppers to provide instructions when ordering products? E.g. input a message for a gift, or to select a colour from a list of options?
  Note: Shopper attributes CANNOT be connected to product price or stock control.

Uploading your product inventory using a CSV (comma separated values) file.

Product details can be input individually or with an upload file. If you have details of your product range held on an existing database or spreadsheet you may want to use your existing application to produce a CSV file. This file can then be directly uploaded, populating your on-line store. The CSV file will need to follow the format described in Appendix A and you will need to set up categories, tax, shipping etc. beforehand (see following notes).

3.3   Text

We recommend that composition of the text for use within the store is checked on a word processor so that spelling and grammar checks can take place before the text is copied into the store pages.

Click and Build allows the addition of HTML formatted text to enable store builders to have more control over the page style. However, you do not need to know anything about HTML to produce a well-designed and functional store.

Much of the text contained in the store will be the short and long descriptions for your products. Typically, the short description will be displayed on the short product layout alongside the thumbnail image. This should give the shopper enough information to identify the product. The optional long

description should contain the full description and any additional information about the product. The long description will be displayed together with the large product image (optional).

3.4   International Trade (Optional)

One of Click and Build's unique features is its 'Internationality', which means that your store can offer any number of currencies to your shoppers (provided you have set these up with WorldPay first). Many Click and Build store operators use their local currency, Euros and US dollars but you can have any of 130 purchase currencies and be paid in any one of the 20 base currencies, so you will need to decide which countries you wish to trade with.

3.5   Tax and Shipping

Most carriers will charge for shipping based on destination, weight and the delivery time required, therefore we recommend that you obtain a comprehensive list of the rates from each of your chosen carriers for each of your possible destinations. You may also consider applying tax separately at the checkout stage, in which case obtain all the necessary information regarding your tax structure for each of your product types and the chosen market locations before building your store.

3.6   Discounts (Optional)

Click and Build enables you to set up generic discounting structures for your products. You will need to plan your discount structure based on the following 3 methods:

- **X** for **y** e.g. 3 for the price of 2
- **%** over **x** e.g. 10% discount on orders over £50
- Free Delivery over **x** e.g. Free delivery on orders over £25

You can also associate each discount with a date range. This provides a period of time during which the discount applies. E.g. you can set up a specific discount that provides a shopper with 3 for the price of 2 discount but only for the January sales. We recommend that you draw up a list and create the discounts that you will need for your store before you start entering any products. More discounts can be added later if needed and you can change which discount applies to a product at any time. You have the option to set discounts at individual product level (and therefore implement 'one-off' specials) or apply them at the basket level for all products.

3.7   Order Management

Maintenance of orders is achieved by using both Order Administration, to provide tracking and order reporting, and WorldPay's CMS (Customer Management System) to enable refunds where necessary and to generate account statements etc. See the CMS User Guide from WorldPay).

3.8   Maintenance of Stock Levels (Optional)

With Click and Build you can maintain the store's individual product levels and the order status, if selected. The stock maintenance facility automatically reduces stock as a result of shopping activity and sends you an email notification when the product stock level reaches a specified minimum or is exhausted.

3.9   Product Attributes (Optional)

Attributes, when present, allows shoppers to **input** and make selections from drop down lists. This enables you to configure a collection of your predefined product attributes including 'free-text' entry from

your shoppers. This could be as simple as choosing a colour or size of a product that you set up, or input of a slogan for a T-shirt or message for a gift card.

Decide what product attributes you wish to use in your store and create them before entering any products into your store. You can apply multiple attributes to a product. Then, when you create the catalogue you can simply link an attribute to a product. More attributes can be added later if needed, and you can change which attribute(s) apply to a product at any time. Please note that attributes cannot influence product price or stock levels.

Some examples:

- *Wrapping Option*– Choose from: 'Xmas, Coloured, Plain'
- *Greeting Message* – Free text entry
- *Slogan* – Free text entry
- *Preferred Delivery Day* – Choose from: 'Mon, Tue, Wed, Thur, Fri'
- *Size* – Choose from S,M,L,XL

3.10   Other Considerations

Consideration of other markets (especially overseas) and terminology should be given throughout the build process. Examples:

- A more generic term such as "Tax" may be appropriate instead of "VAT" or "GST" to describe your specific tax structure although different rates may be applied for different markets.
- If you advertise your telephone number include the international dialling code (a table of which is given in *Appendix C*).
- Date formats vary from country to country so we recommend that you spell dates rather than relying on a numerical format.

3.10.1   To preview your store as you build

The 'View store' link takes you to the shopper's version of the store where you can actually view how your store will look when accessed by your customers. This link can be used even before you start building your store. In this case Click and Build will display a store based on the default settings. Click **View store** in top right navigation.

3.10.2 How to Take Payments

When your store is complete and authorised to go live, you can receive payments from shoppers. Payments are transacted through the in-built **WorldPay Payment Gateway**.

Click and Build is already integrated with WorldPay's renowned multi-currency secure payment gateway. Therefore you need do nothing to your store to process secure credit and debit card transactions. WorldPay take payments in over 130 currencies and will settle in one of 20 major currencies.

Taking an online payment from a shopper is simple and efficient. See the diagram above. The shopper is asked to complete a secure on-line payment page (displayed from the WorldPay payment gateway), which in turn is directly linked the bank processing systems. These secure links provide rapid authorisation of a shopper's transaction. Once authorisation is received email confirmation is sent immediately to the shopper from WorldPay with a unique transaction reference. Shoppers can view their transactions using WorldPay's Customer Management System (CMS). **In addition**, you will receive notification of the transaction.

For further information about the payment process view the WorldPay web site at:

http://www.worldpay.com

3.10.3 Refunds

When payments from your store have been processed you will be able to access them on WorldPay's Customer Management System (CMS), where you will be able to make a refund. Refer to the CMS user guide on the WorldPay website or contact WorldPay customer services for further advice (0870 742 7002).

When an order has been refunded using CMS you will then need to mark the order as 'refunded' in the Orders section of Click and Build.

> **Note:** Completing a refund in CMS will not update Click and Build and vice versa.

3.10.4   Obtaining a WorldPay Account and Installation ID number

If you wish to take payments through your Click and Build store you must apply for a WorldPay account. Apply online at http://www.clickandbuild.com or contact our sales team on 0845 123 5622.

Once WorldPay has opened an account you will receive a WorldPay Company ID with details on how to access the WorldPay Customer Management System (CMS) plus an Installation ID number for your Click and Build store. This normally takes around 10 working days.

3.10.5   Advertising Your Store

A store can be advertised in many different ways, however most shoppers generally locate web sites by using on-line 'search engines'. You will need to register with the search engines and we recommend you also 'Optimise' your site.

 Click and Build offers a bespoke SEO (Search Engine Optimisation) service **Search4** with proven results and guaranteed deliverables. **Search4** operates with ALL the major search engines e.g. Google, Yahoo, MSN etc…

For more information about **Search4** please email sales@clickandbuild.com or contact our sales team on 0845 123 5622. Further information is also available on our website at http://www.clickandbuild.com.

3.10.6   Hosting Click and Build

Your Click and Build store is **hosted by Something4 Ltd** therefore **you need do nothing** more everything you need is provided.

However, if you have an existing website and require the domain name to go directly to your Click and Build store you will need to request a **CNAME entry** from your domain host. They will ask for the CNAME reference, which is part of the Click and Build URL. The format is: servername.clickandbuild.com (nothing else) e.g. apple.clickandbuild.com

If you just want to **link** from your existing website to the Click and Build E-commerce, catalogue and payment functions, then you can request that a sub-domain be set up by your domain host [e.g. **shop**.mywebsite.co.uk]. Once set up you can insert the hyperlink in your website where you want to present your products.

When you have completed your build and run some TEST transactions you will need to ask WorldPay to activate your Store. Once notified WorldPay will manually review your site and confirm the 'OK' by email. We will also be notified to move your store from TEST to LIVE.

> **Note:** To activate your Click and Build store for LIVE on-line transactions you will need to complete the "**Activation Request Form**" located at: http://secure.worldpay.com/app/arf,pl?brand=somethingfour (this is accessible through your Control Panel and through the Click and Build site)
>
> The process is normally completed in two to three days.

4 Getting Started

Welcome Email

You will receive an email from us that provides two access points to your store along with the User ID and the Password. The access points are:

- Via the Control Panel
- Direct through the Click and Build logon page

4.1 Control Panel Access

The main features of the Control Panel include:

- Access to the ADMIN area of your store
- Additional traffic statistics, graphs and Search Engine information. This is provided free of charge but you will need a CNAME reference from your domain host.
- Quick link to your WorldPay CMS account sign on screen
- Contact Click and Build quick link
- Activation request to set your store LIVE when ready
- News and updates
- Offers

You will be presented with the Control Panel logon. Note the 3 elements listed in the centre of the page (Protocol, Server and Store ID). **Click… Go to your control panel now.**

Click on the link provided in the email. Confirm acceptance of the Terms and Conditions.

Then enter**:**

- **Protocol** : e.g. http//
- **Sever** : e.g. apple
- **Store ID** : e.g. mystore

Now enter your User ID and Password further down the page:

- **User ID** : e.g. user
- **Password** : e.g. password

When you sign on you will be presented with the **Control Panel Services** page; click on the **Administration link** to go direct to the **(admin) HOME PAGE.**

You only need enter the above information the FIRST TIME ONLY thereafter you can sign on using the following URL: https://dashboard.clickandbuild.com. You will always be presented with the Control Panel and only be required to enter your User ID and Password to gain access if you check the 'Remember my store details' box.

> **Note:** We recommend that you follow the process outlined and sign on via the Control Panel as this provides you with a number of additional tools and the ability for us to keep you posted with news and developments.

4.2   Direct Logon

Click on the direct access link. This is your store address (URL) and will follow the following layout:
http://domainserver.clickandbuild.com/cnb/admin/storename

Enter your User ID and Password:

- **User ID**   : e.g. user
- **Password** : e.g. password
- Click **Logon**

Read the Terms and Conditions, check the 'Accept' box and click Confirm. You will then be presented with the **(admin) HOME PAGE**.

> **Note:** The assigned ID and password are case sensitive. Enter them exactly as assigned to you. If you have forgotten your user name or password you can submit a form via the control panel for reissue.
> You can change your user ID and password anytime in **Store Settings** – User account

> **Note:** After a period of inactivity you may find that you are returned to the Click and Build logon screen. This is quite normal and indicates that Click and Build has automatically logged you out. This is designed to reduce the risk of unauthorised access to your store should you forget to log out.

5   Navigation

Navigation shows **along the top** and **the top right**; these links are explained below.

Main Menu	Menu Options	Section Description
Store Settings	STORE SETTINGS HOME	Provides information and links to the functions under this heading.
	Company Profile	Enter your company details here. These will be used on the 'Contact' page and the emails that are automatically sent to shoppers. You will also be asked for your email addresses so that Click and Build can email you with events such as incoming orders and stock warnings (if applied).
		If you already have a web site which leads to your Click and Build store, you can enter the URL in the 'Web Address' field to allow the shoppers to navigate back from your store to your main site.
	User Accounts	Create and edit user privileges, ID's and passwords.
	TAX AND SHIPPING	Define tax and shipping rules here. You will need to define the countries that you will be trading with, how you will ship to them and the appropriate tax rates (where you need to show tax separately). Once this information is entered Click and Build can automatically calculate the relevant tax and shipping costs.
Images	IMAGES HOME	Store all the images you are intending to use here. This library needs to be created to display any images in your Click and Build store.
Store Design	Steps 1 - 11	Easy steps to create the 'look and feel' of your store; choose the overall layout and select Header and Theme designs from a range of pre-loaded images. In addition, you can add your company logo, change navigation graphics, colours and fonts, specify the layouts of the various store pages and enhance the overall look and feel.
Catalogue	CATALOGUE HOME	Define product categories and products and manage your inventory here. It also provides access to add product attributes and maintain other options.
	Create Category	Create categories for products.
	Create Product	Create a product and add to a category.
	Quick Edit All Products	List ALL products from all categories with edit facility.
	Find a Product	Locate a product from a drop down list.
	Product Attributes	Create a product attribute. E.g. product sizes
	Discount Options	Create a discount scheme.
	Upload Product Database	Upload a spreadsheet of products via CSV file.
	Download Product Database	Download the product inventory into a CSV file.
	View Orphaned Products	Show all products that are without a category.
	Catalogue Reports	Create, run, edit, and delete product reports.
	DOWNLOADABLE ITEMS	Add software products to the inventory e.g. computer games, documents.
Orders	ORDERS HOME	Information and links to the menu items under Orders.
	View Uncompleted Orders	Lists orders processed by WorldPay awaiting shipping and update (completion).
	View Completed Orders	Shows completed orders after shipping.
	View Archived Orders	Holds orders you classify as archived.
	View Refunded Orders	Shows orders marked as refunded.
	View Disputed Orders	Shows orders marked as disputed.
	View All Orders	Shows ALL orders from all classifications.

| | Search Orders | Provides a quick look-up to help with customer enquiries. |
| | View Order Reports | Create, run, edit, delete order reports. |

Home		Provides links to 'Commonly run tasks', basic statistics and a number of default store settings.
View store		This will display your store as your shopper will view it. You can click this at any time.
Control panel		This provides access to a number of ancillary tools and services.
Logout		This will log you out of the store building administration area and return you to the login screen. The login screen also allows direct access to view your store.

5.1   Home Page (Additional notes)

The Home Page includes 'Commonly run tasks', conveniently available for maintaining and operating your 'Live' store.

Store statistics

The first section displays the name of the user and the date of the last login. It also displays the account status, the WorldPay installation ID number and the base currency being used.

Your default 'Account Status' is **Test** but once your store is ready it can be activated by sending a request to WorldPay available from your Control Panel, or use this link:

https://secure.worldpay.com/app/arf.pl?brand=somethingfour

The 'Order statistics' section gives general information on the order status and the number and value of orders.

'Store report' shows overall usage and further content of your store. 'Run full site report' requires a start and finish date and will show a range of statistics including; the total number of visitors to your store, the amount of server disk usage, the number of products, variations, images and downloadable items being used in your store on the dates selected.

Admin Preferences

If you have many hundreds of products to manage you may like to turn off the real-time product and image trees (where ALL products and images are listed), as this will enhance page loading to your browser. **However**, if you are just starting or only have a few hundred products it is best to leave this function 'ON'. This only affects listings of: Products, Images and Downloadable items.

> **Note:** In addition to the statistics shown here our **enhanced** statistics package is available via your Control Panel **free of charge**. To take advantage of the additional statistics you will require your own unique domain name. For further information email: support@clickandbuild.com

Other

Show inline help – this allows you to turn ON/OFF the help function displayed on the right of your page. This function is useful to start with but you may like to remove it later.

Store admin links visible – if selected Click and Build will display a set of additional navigation buttons when you '**View store**'. These links **take you back** to the appropriate admin section for edit. This is particularly helpful when building your store.

6   Store Settings

6.1   Company Profile

This area is used to enter the key details relating to your business. The contact information appears in your contact page and in all the 'key event' emails sent by Click and Build to your shoppers (such as transaction confirmation and order fulfilment confirmation).

6.1.1   Company Name

The company name will be displayed on the contact details page and in all 'key event' emails sent by Click and Build to your shoppers (such as transaction and order fulfilment confirmations). If you do not upload a company logo image to use on your store then the 'Company name' field will appear at the top of all your store pages (you will be able to change font, size and colour).

6.1.2   Address, Town, State/Region/County, Country, Post/Zip Code

Will be displayed on the contact details page and in all emails to your shoppers.

6.1.3   Telephone Number, Fax Number and Email Address

Will be displayed on the contact details page and in all emails sent to your shoppers.

The email address will be a hyperlink to enable shoppers to send emails to you direct from the contacts page.

6.1.4   Web Address

Only enter this if you have a separate parent site you wish to use as the 'Main website' link and return shoppers to. The entry format for this parameter is http://xxxxxxxxx / (where xxxxxxxxx equates to the parent site URL address).

6.1.5   Low Stock / Stock Depleted Email Address

By entering an email address (for example stock@mysite.com) you can receive warnings of low stock or out of stock situations in your inventory. Stock is automatically updated after the shopper has completed a transaction – See note below.

> **Note**: These warnings only work if the **Activate low-stock warning emails** box is checked and you have applied stock checking to your products in the store. Only one email address can be entered.

6.1.6   Order Confirmation Email Address

By entering an email address (for example *orders@mysite.com*) you will receive automatic confirmation of any authorised orders from your store.

> **Note:** The confirmation email only works if the **Activate order confirmation emails** box is checked. Only one email address can be entered.

6.2   VAT Information

If you are VAT registered please enter details here for our reference purposes.

6.3   Search Engine Details & Site Description

Enter the keywords for search engines here and a short description of your online store. These are used by Click and Build to automatically create Meta tags (used by search engines) to define and classify your store.

For an e-commerce store to be successful it must be visible in the search engines. One of the most cost effective methods is through Search Engine Optimisation (SEO).

> **Note:** Click and Build have established a dedicated SEO service "**Search4**". This takes care of all search engine submissions and provides the infrastructure to generate cost effective traffic to your site from each of the popular search engines such as Google, Yahoo, MSN etc. For more information about "**Search4**" please contact our sales team on 0845 123 5622 or email sales@clickandbuild.com

Once you have completed updates in any of the fields remember to click the Save changes button at the foot of the page to save the details.

7 User accounts

This area enables you to establish and edit additional users assigned to the administration facility (with restricted access if required).

7.1 Adding a new user

- Click **Create new user account**.
- Enter the new username, password (repeat) and 'Permissions', click Create new user.

7.2 Permissions

You can set up another 'system administrator' (use drop down box) or a 'Custom' user with access to specific functions (uncheck the boxes that should not apply). Selecting 'System Administrator' from the 'User Level' drop down list will automatically assign "global" privileges.

7.3 Edit / Delete user

Any user can be selected by the administrators and displayed for editing and password amends. When the Edit screen is displayed simply check/un-check the appropriate boxes for the permissions required for the user in question**.** Click **Edit**.

Users can also have their access withdrawn temporarily by un-checking the 'User active' box.

The only edit permitted for the System Administrator is to change the password.

Passwords are case sensitive.

> **Note**: If you forget your password you will need to inform the support team of your full Click and Build store URL (e.g. *http://cnb-host1.clickandbuild.com/cnb/shop/dem*) and your WorldPay Company ID in order for us to reset your password.
> **You can easily email us from your Control Panel.**
> Email: support@clickandbuild.com

8   Tax and Shipping

8.1   Introduction

Tax and shipping has to be flexible to accommodate wide range of needs and that can make it appear complicated at first sight. But imagine you were going on holiday and had to give your new dispatcher simple instructions so that he could raise invoices and handle dispatch while you were away. You would need to tell the dispatcher 5 key pieces of information:

- The shipping destinations e.g. UK and EU
- The products that fall into different tax groups e.g. CD's and Books
- The tax rate for each group e.g. 17.5% (UK VAT) and 0% (International Tax)
- The shipping groups e.g. First class, Second class
- The shipping rates e.g. 1.50 per item, 5.00 per kilo

To make life easier you can assign items with identical characteristics to groups and give a value to the whole group which is the principle used by Click and Build's Tax and Shipping system; specify a common group name and assign values to the group. In this way you can then assign items to the group(s) as needed.

> **Note:** The examples given in this section are intended for clarification only. If you are uncertain about taxation rules, duties or any other legal implications of trading on-line, professional guidance should be sought.

> **Note:** If you intend to work with GROSS amounts and do not intend to show any tax element (i.e. show the full selling price including any tax) then you will not need to set up any tax parameters. However you will need to set shipping parameters unless the total selling price ALSO includes the full shipping costs and you do not intend offer different shipping options.

8.2   How it works for the shopper

When the shopper is ready to buy (at the checkout page) they will be presented with a list of the Delivery Options that you will create (you will see how to do this later).

Lets say that you have created your delivery options and the shopper chooses UK First Class Post. This choice clearly implies that they want delivery in the UK so this choice will bring the following to the order:

- UK Tax rates (as set up for that product group)

- The shipping cost by First Class Post.

- And the user will b elimited to a delivery address in the UK
(The country dropdown list for delivery address will only have UK in it)

So to make this work we have to predefine the tax rates, the shipping costs and destination criteria. You will set up your required delivery options as the **final step in the process**.

We have set an example below to illustrate how the system works.

> **Note:** If you have any questions on any section within the Tax and Shipment menu please email support@clickandbuild.com or call 0906 7120304 (calls charged at 50p per min) and the dedicated Click and Build support team will be pleased to help.

> **Note:** We recommend you read through this section first and have all your tax and shipping requirements (and charges) to hand before you create your tax and shipping structure.

8.3   Click and Build Tax and Shipping Structure

The structure is summarised below and is the order in which you should create the parameters. When the parameters are set you will be able to **apply them** (in a one-step summary form) to all your products:

8.3.1 Shipping Destinations e.g. UK, Europe, USA/Canada

8.3.2 Tax Configuration

Tax Groups e.g. Safety wear, Children's Clothes, Adult Clothes

Tax Rates e.g. 0%, 17.5%

8.3.3 Shipping

Shipping Groups e.g. Safety wear, Clothing

Shipping Rates e.g. UK Parcel rate, USA/Canada USB, Europe USB

How Applied e.g. Whole Order Level

8.3.4 Delivery Options E.g. UK, Europe, USA/Canada

8.3.1   Shipping Destinations

This allows you to specify exactly which countries you wish to ship to, either individually or in groups. You can define as many different shipping destinations as you wish.

The shipping destination allows you to match the countries with the dispatch method. This is how you stop someone choosing a UK delivery charge and then giving a delivery address in Australia.

EXAMPLE

In our example we will assume that we operate in three markets – the UK, US and Canada. Let us assume that the delivery costs are the same for USA and Canada so we can combine these markets into one 'Shipping Destination'. So we actually need to set up just two destinations – 'UK' and 'US & Canada'. Note: If you needed to keep Canada separate from the USA you would set this up as a separate destination – you can have as many as you need.

To create destination groups for our example:

- Select **Create destination group**
- In the Description field type **UK**
- Select **Pre-defined** and choose **UK** (or select *Local country* radio button of you are UK based)
- Click **Create destination group**
- Message - Shipping destination group stored
- Then repeat - select **Create destination group** (at foot of page)
- In the Description Field type **US & Canada**
- Select **Select/exclude countries**
- Scroll down the countries list until you find '**Canada**' then click on it once to select it.
- Hold down the '**Ctrl**' key (PC users) or 'apple' key (Macs) on your keyboard to maintain the selection then scroll down and select **United States**.
- Click on the **selected countries** radio button
- Click **Create destination group** (at foot of page)
- Message - Shipping destination group stored

To Edit

- Choose from drop down
- Select **Edit** alongside choice
- Make changes
- Click **Save changes**
- Message - Shippinh destination group updated

To Delete

Select the Shipping destination from the drop down list you wish to amend and click **Delete.** You will be asked to confirm any deletions. Click 'OK'.

Note: If a shipping destination is assigned to a delivery option you will not be allowed to delete until the shipping destination has been removed from the delivery option.

8.4   Tax Configuration

This comprises two sections: Tax Group and Tax Rate.

8.4.1   Tax Group

Tax groups are <u>groups of products</u> that have the <u>same tax</u> applied to them.

Example

In our example we will sell Books and CD's. We sell over 100 different CD titles (which are all individual products) but they will all have the same tax rate applied to them so we will have one Tax Group for CD's (called 'CDs'). The same applies to our 80 book titles so we will have a second Tax Group called 'books'.

> **Note:** This is a UK example where we do not apply Tax to books. If you only ever deal with one standard TAX on all your products then you need to add just one Tax Group.

To create tax groups for our example:

- Click **Create tax group**
- In the Description Field type '**CDs**'
- Click **Create tax group**
- Message displayed to confirm
- Click **Create tax group**
- In the Description Field type '**Books**'
- Click **Create tax group**
- Message displayed to confirm

There are now two tax groups one for each 'type' of product.

To Edit

- Choose from drop down
- Select **Edit** alongside choice
- Make changes
- Click **Save changes**
- Message – Tax group successfully updated

To Delete

Select the Shipping destination from the drop down list you wish to amend and click **Delete.** You will be asked to confirm any deletions. Click 'OK'.

> **Note:** The diverse range of International rules regarding the taxation of goods can be accommodated by Click and Build. The functionality of this software enables you to specify your own tax rules to accommodate **any required situation** for your local market and abroad.

Of course, you will need to create your own tax groups relevant to your product range.

8.4.2   Tax Rates

Tax Rates define the percentage (%) of tax charged for each product as applied to each Tax Group.

Example

In our example we will need to specify the tax rate for our two Tax Groups (CD's and Books) **as they apply** to our two Shopper Locations (UK and US & Canada):

- Click **Create tax rate**
- In the Description Field type '**UK Tax'**
- Add **0** to Books and **17.5** to CD's in the boxes provided
- Click **Create tax rate**
- Message displayed to confirm
- Click **Create tax rate**
- In the Description Field type '**Overseas Tax'**
- Add **0** to Books and **0** to CD's in the boxes provided
- Click **Create tax rate**
- Message displayed to confirm

So far we have two Tax Groups (product groups) created, one for Books and one for CD's, and now two Tax Rates for **UK Tax** and **Overseas Tax**. Where we are set to charge tax on CD's but not books for our UK customers and will not charge tax on either tax (product) group for our overseas customers.

It will be necessary to **apply them** to the individual products. In other words ensure that all the books on the site fall into the Books Tax Group and all the CD's fall into the CD's Tax Group. This is completed when creating products (see Create Product section).

To Edit

- Choose from drop down
- Select **Edit** alongside choice
- Make changes
- Click **Save changes**
- Message - Shipping destination group updated

> **Note:** For many stores operating in just their local market (e.g. UK) their product range may be subject to just one tax and therefore will only need to set up one Tax Group with one rate e.g. 'TAX' (at 17.5%)

To Delete

Select the Shipping destination from the drop down list you wish to amend and click **Delete.** You will be asked to confirm any deletions. Click 'OK'.

8.5   Shipping

8.5.1   Shipping Groups

Shipping Groups are groups of products **that have the** same shipping charge**.**

Example

With our example lets assume we will have a **fixed shipping charge** for CD's but for books we will charge by **weight,** so we need two Shipping Groups, one for CD's and one Books.

You may think that we are duplicating the tax rates that we previously set-up but this is not the case. Although both use the same names (CD's and Books) they are totally separate because you will **need to split each shipping charge** by the different product groups.

> **Note:** If you are shipping ALL products using one shipping scheme e.g. every product within the store will incur a fixed cost (x per order) you will only need to set-up one Shipping Group.

We will now set-up the groups and apply the unit rates:

- Click **Create shipping group**
- In the Description Field type '**Books**'
- 'Shipping model options' – see below (this shows the first time you enter a shipping group.)
- Check **Use shipping limits** and click **Save changes**
- Message shown – 'Shopping group stored'
- Click **Create shipping group** again
- Enter description – '**CD's**'
- Click **Create shipping group**
- Confirmation message will show

> **Notes: Shipping Model Options**
>
> When you enter **the first shipping group** you will be presented with **shipping model options**. You have three shipping model options to choose from but **all** are optional:
>
> 1. **Apply Shipping Limits** - this enables you to set a maximum and minimum cost for your shipping regardless of the number of items dispatched.
>
> 2. **Apply Tax on Shipping** - this enables you to add tax to your shipping charges.
>
> 3. **Allow Upload of Rates Through CSV Files** – this enables you to apply a banding scheme to the different shipping rate groups using a CSV file with the information pre-set. See *Appendix F* for more details on the format of the CSV file and upload.
>
> To include any of these options check the adjacent box, then additional data will be requested when you set-up the shipping parameters. To edit these options, click **Change shipping options** alongside the Change Shipping Model Options heading.
>
> **Example**
> For our continuing example we will only use the minimum and maximum shipping charges. Check the **Use shipping limits** box and **Save changes**.

To Edit Shipping Groups

- Choose from drop down
- Select **Edit** alongside choice
- Make changes
- Click **Save changes**
- Message - Shipping group updated

To Delete Shipping Groups

Select the Shipping destination from the drop down list you wish to amend and click Delete. You will be asked to confirm any deletions. Click 'OK'.

8.5.2   Shipping Rates

Now that we have added in the different product groups (CD's and Books) we need to set-up the rates/charges e.g. First Class UK, Next Day UK, Airfreight US and Canada, etc.

Each shipping rate you set-up will be dependent on the method of delivery, the product type, and its destination. So, for **each** 'Shipping Group' (CD's and Book's) you will need to define every delivery option you intend to make available with its associated costs. You can set as many shipping methods/charges as you need.

> **Note:** The rates are the costs you will charge the shopper, not necessarily the costs from the carriers. You will need to get price lists from your chosen carriers but you do not need to duplicate them here, you may wish to set-up a simpler pricing structure.
>
> ***E.g.*** If Royal Mail charge you £1 per item for up to 10 items, then 75p per subsequent items up to 50 items, etc… you can simplify this to be a cost of £1 per item so you remain competitive and still make money on shipping charges.

Example

In our example we have **2** shipping groups and will offer just **2** shipping methods **UK First Class** and

USA/CAN UPS, therefore we will need to have **4** shipping charges:

- UK – Books
- UK – CDs
- US/Canada – Books
- US/Canada – CDs

…. and for good measure we will set **minimum and maximum unit charges** for all of them having already requested 'Shipping limits' through **Shipping model options**.

- Click **Create shipping rate**
- Enter the description '**UK First Class**'
- Under Books select **Weight** from the drop down box and enter **2.75** in **rate box**
- In the Min box type '**2.45**' this will be our **minimum** shipment charge for Books.
- In the Max box type '**45**' this will be our **maximum** shipment charge for Books.

- Under CD's select **Fixed** from the drop down box and enter **1.50** in **rate box**

- In the Min box type '**3.00**' this will be our **minimum** shipment charge for CD's.

- In the Max box type '**10.00'** this will be our **maximum** shipment charge for CD's.

- Click **Create shipping rate**

- Message displayed to confirm Click **Create shipping rate** again

- Enter the description '**USA/Canada UPS**'

- Under Books select **Weight** from the drop down box and enter **3.75** in **rate box**

- In the Min box type '**10**' this will be our **minimum** shipment charge for Books.

- In the Max box type '**75**' this will be our **maximum** shipment charge for Books.

- Under CD's select **Unit** from the drop down box and enter **3.50** in **rate box**

- In the Min box type '**7**' this will be our **minimum** shipment charge for CD's.

- In the Max box type '**45**' this will be our **maximum** shipment charge for CD's.

- Click **Create shipping rate**

- Message – 'Shipping rate stored'

For the UK we are set to charge books at 2.75 with a minimum charge of 2.45 (max 45.00) AND set up to charge for 1.50 each to ship CD's with a minimum charge of 3.00 (max 10.00).

For USA/Canada we are set to charge books at 3.75 with a minimum charge of 10.00 (max 75.00) AND set to charge CD's at 3.50 with a minimum of charge of 7.00 (maximum 45.00)

To Edit

- Choose from drop down

- Select Edit alongside choice

- Make changes

- Click Save changes

- Message - Shipping rate updated

Note: You can choose your own unit of weight, which can be whatever is appropriate **but you must use the same unit** when you specify the weight of products later.

To Delete

Select the Shipping destination from the drop down list you wish to amend and click Delete. You will be asked to confirm any deletions. Click 'OK'.

8.5.3 Select Shipping Level - IMPORTANT SECTION

Shipping charges may be applied at: Whole Order Level **OR** Item Level **OR** Shipping Group level and this selection is made in 'Select shipping level'.

Whole order level – This is the most common and simplest to set-up.

This should be used for **Fixed** Shipping Rate and may be used for **Weight Banding**.

This means that one Shipping Goods group is applied to every item that the shopper adds to the basket, independent of the product selected. If your store is straightforward with a consistent product line (e.g. you just sell CD's) then shipping is likely to be straightforward. Whole order level is then often the

Note: When you select 'Whole order level' **you will need to select** a previously created **Shipping Goods Group** from the drop down list to apply to the whole order. If no Shipping Goods Group is selected the default will be set to 'none' **and no shipping will be applied**.

best option since you do not need to apply any Shipping Groups' to individual products.

> **Note:** If you set Shipping Level at **Whole Order Level** then you will need to specify which shipping group to use (as one will need to apply).

> **Note:** If you set Shipping Level to **Whole Order** you still need **to apply Tax to products**.

Item level – this means that the shipping is added per item ordered.

This should **ONLY** be used with **Unit** Shipping Rate. If you are using banding for a particular set of products this option is **not** to be selected.

Shipping group level –this may be used with **percentage** (%), **weight** and **banding**.

> **Note:** If you need to have **more than one** Shipping Goods Group, consider operating at "Item level" or "Shipping group level". Each has advantages and disadvantages.

If you are specifying your shipping through a banding scheme this is the best option.

This should **not** be used for **Unit** Shipping Rate or **Fixed** Shipping Rate.

Example

In our example we have different Shipping groups and therefore we need to select **Shipping Group Level**.

To select a shipping level:

- Click Choose shipping level
- Check radio button
- Select 'Shipping Group Level' from drop down box
- Click Save changes
- Message displayed to confirm

> **Note:** If you set-up your tax and shipping **after you have added your products** then you will need to edit each product in order to apply your shipping requirements unless you intend to apply shipping at Whole order Level.

8.6   Delivery Options

Note: **Without applying Delivery Options your tax and shipping will not work.**

This area is used to draw together the tax and shipping rates and the delivery destination to present a **single list** to your shoppers to choose from. This list will appear on the store in the form of a drop down box. Since shoppers will see this (the only part of the tax and shipping they will see) it is recommended that the text be thought through and presented clearly.

Example

In our example we need to set-up two Delivery Options one for UK shoppers and one for US and Canadian shoppers.

1.   Click Create delivery option
2.   Enter the description 'UK Shopper'
3.   Click Tax Rate drop down box and select 'UK TAX'
4.   Click Shipping Rate drop down box and select 'UK First Class Post'
5.   Click Shipping Destination drop down box and select 'UK'
6.   Leave the Default box checked - this will be the default charge to show
7.   Click Create delivery option
8.   Message will be displayed and you will return to Tax and Shipping
9.   Click Create delivery option
10.   Enter the description 'US or Canadian Shopper'
11.   Click Tax Rate drop down box and select 'Overseas'
12.   Click Shipping Rate drop down box and select 'US/Canada UPS'
13.   Click Shipping Destination drop down box and select 'US and Canada'
14.   Leave the Default box unchecked – our previous entry will be the default
15.   Click Create delivery option
16.   Message will be displayed and you will return to Tax and Shipping

A summary of your destinations is clearly laid out under **Shipping destinations** which you can **edit** or **delete** as necessary.

Now we can offer the shopper a single choice that will select the tax and shipping rates that will be applied to the order and limit where the order can be dispatched.

If the shopper selects '*US or Canada Shopper*' their order will have tax charged as specified by the **Tax Group** (in our example 0%), they will be charged for delivery by UPS, and when they enter their delivery address the country drop down list will only have options for the US and Canada.

If they select "*UK First Class Post*" then tax will be applied as specified by the **Tax Group** (in our example 17.5%), shipping will be UK Shopper, and the delivery country will be limited to United Kingdom.

8.7   Report Menu (for CSV Uploads)

This information is important if you are going to upload your products through the CSV (comma separated value) file. If you are not using the CSV upload function then you do not need to know the ID's that Click and Build has created for these groups.

- **Shipping Group ID's**
  The shipping group report displays the ID number for each group and provides a link to edit details (click **Edit**).

- **Tax Group ID's**
  The tax group report displays the ID number for each group and provides a link to edit details (click **Edit**).

8.8   Further Notes on Shipping

8.8.1   Shipping Rate Types

By Fixed Price – a less common charging method as the total charge is not variable according to the number of products ordered. If you enter a value of 5.00 fixed shipping, no matter how many items are purchased the shipping charge will only ever cost 5.00.

By Unit - a more common method is cost per unit (as entered in the rate box) is multiplied by the number of items bought. E.g. If the rate is set to 5.00 and 3 items are purchased then the shipping charge will be 15.00.

By Value Percentage – where the shipping cost is derived from a percentage of the total product cost E.g. if the rate is set to 10% and 3 items were in the basket totalling 50.00 then the shipping charge would be 5.00.

By Weight - the price per unit weight as entered in the rate box. Note: The actual unit measure (g, Kg) used does affect the calculation, as all that is required is the result of the multiplication, this is then used in combination with the weight of the product which you specify when you create your products. (Note: The weight figures are **not** displayed to shoppers.) The shipping cost is calculated by multiplying one figure with the other. E.g. If all the products within the store weigh 2Kg's and the rate set is $4.00 per KG and 3 products are purchased the total shipping cost would be 2 x 4 x 3 = $24

IMPORTANT: Weight measures cannot be mixed – the unit used must be constant. E.g. if another product was added which weighs 200 grams, the weight for the product would need to be entered as 0.2 (Kg), or shipping would be charged at 200 Kg

In many instances it is necessary to have the first item costing more to ship than subsequent items. Click and Build can accommodate this with its banding function. Banding works by allowing you to specify the cost for each band either through unit or weight.

In the Rate box you will need to enter the rates in the following format:

Example: 1=3; 2=3.50; 3=4; 4=4.5; 5=5; *=20

(Rate type can also be banded e.g. 1=3; 10=30 - where up to 1kg is 3.00 and more than 1 but less than 10Kg = 30.00).

In the above example 1 unit will cost 3, 2 units will cost 3.50. "3" units ordered will cost 4.00 etc. Remember, a unit may be quantity or weight and the cost will be whatever rate your currency is.

The "Rate type" can be set as either "Unit" or "Weight" as previously outlined. E.g. If this is set to 'weight' then the first number represents the weight, i.e. 1Kg=3, 2KG=3.50, etc.

The * is used to represent any value after the last defined band. In this example after 5 units the * is added. If a shopper purchases more than 5 units the cost will be a fixed charge of £20. This means the shopper could purchase either 6 or 500 (say) units and still only pay £20 shipping. For this reason it is good practice to define more bands and /or set the * figure to a high shipping cost (so that you do not loose money for high volume orders).

Note: The * **must be set** otherwise orders above the last fixed value entered will not have **ANY** shipping charges applied.

9   Images

Image folders are used to organise your images and need to be defined and created prior to uploading your images. It is recommended that at least one folder be set up for the exclusive use of images that will be used in the design of your store (e.g. Logo, background, navigation buttons etc…) and assign a separate set of folders for each of the product Categories. This recommendation does not have to be followed as you could for example put all of your images into one folder or indeed increase the number of folders used, but the main reason for using folders is **speed of maintenance** as your store evolves and grows over time and changes need to be made.

Note: The maximum number of images per folder is 100.

Note: Each image will be assigned a unique sequential ID number by the system.

9.1   Adding a folder

From the Image home page click the Create new folder button. Enter the folder name, then click either the Create image folder button (or cancel request if you do not wish to proceed). An 'Information' message will be displayed that has a link to return to the image home page, or you can insert another folder name. Remember to click Create folder. In this way you can create several folders one after another.

9.2   Deleting a folder

Click the **Delete** button next to the folder you want to delete. A pop up confirmation window will be displayed where you can confirm or cancel the delete request.

Note: Only empty folders can be deleted. Therefore you need to ensure there are no images in the folder. See Delete images below.

TIP: Deleting multiple images from a folder is not possible in one action. If you need to remove a folder completely remove all images from it first. Use of additional image folders will allow you greater control of your image library. Unused images should be removed to avoid using additional storage on your store.

Rename a folder

Once the folder has been defined use **Rename** to change name. Click **Rename** next to the appropriate folder. Insert the new name and **Save changes**. Cancel request will return you to the image home page without making any changes.

Uploading an image to a folder

Click the **Upload** button next to the folder you want to upload. Click the *Browse* button to search for the image to be added. When you have selected the image click the **Open** button (in the pop-up) to upload your image to the image library. Alternatively, if you know the location of the file on your computer you can insert this into the entry field.

> **Note:** Click and Build supports JPG and GIF image formats. Please refer to the User Guide for more details for more details.

You can use the Image description field to add a description to the image; this makes your Image Reporting more descriptive and provides the image with a Tool-Tip message that appears when your shoppers' mouse runs over the image in their browser. If you do not enter a description the file name will be used as the description by default. To confirm the upload operation, click ***Upload image***.

9.3   Uploading Multiple Images Automatically

Click and Build can upload Zip files containing many images. This can speed up the Image set up process enormously by allowing you to upload an entire folder of images in one go.

Should you wish to find out more information on how to prepare a Zip archive please visit http://www.winzip.com/

To upload a Zip file click *Browse* **to search for the appropriate Zip file on your computer, click** *Open* **and then check the** *Zip Archive* **checkbox.**

> **Note:** If you enter a description, it will be used for ALL the images from the zip file however, the default description label will be allocated a unique numeric suffix for each image. Once the images are loaded you will be able to alter the default description if you need. If the description is left blank the image file name (not the Zip file name) will be used as both the file name and description. This can also be changed if necessary.

To confirm the upload operation, click *Upload image***.**

Once the file has been uploaded it is automatically unzipped and the folder populated with the images. The unzip time will depend on the number of images in the Zip file, their size and your Internet connection speed.

When the images are uploaded you will be presented with a list of files (images) together with their ID's. You will be given option for you to change both the file name and the description of the image and view it.

9.4   Working with Images

Uploaded images can be viewed, modified, overwritten or deleted from the folders. If you want to view all the images in the folder simply click ***View*** next to the relevant folder. All the images will be displayed in the table where you can use the ***Delete*** or **Edit** buttons located under the image you want to work on.

Alternatively if you want to work on the specific image, you can first open the folder by clicking the '+' sign on the left side of the folder name and then select an image by finding it on the drop down list. Once the image is selected from the list click ***Edit***, ***View*** or ***Delete*** which are located on the right hand side of the drop down list.

To list all folders and images at once, run the ***Image ID Report*** located at the bottom of the page. This report will list each of the image folders separately. This report displays ID numbers for each image, the image name and it's description with links to View/Edit/delete.

> **Note:** If you are going to use a CSV file to upload your product inventory you will need to make a note of all of the Image ID numbers. These ID numbers should be entered directly into the CSV file for upload. See *Appendix A* for more details.

9.5　Edit Image

Here you can change the name of the image displayed in the drop down list as well as its description (shows with mouse over Tool-Tip). You can also overwrite an existing image with a new image by associating the new file with an existing image ID number.

This is useful when you need to change an image that appears in many places throughout your store. To do this enter or browse for the new file from the select image entry field (on the Edit images section) and save the changes. The changes will be associated with an existing Image ID number and will apply everywhere the image is used in your store.

9.6　Deleting Images

When deleting an image a pop-up message will appear requesting 'confirmation' to delete to avoid accidental deletions.

TIP: Unused images should be regularly removed from the image library as they increase the disk space that your store uses.

10 Store Design

Steps 1 to 11

Here you can follow the step-by-step store design process. You will be presented with steps 1 to 11 which you can take in sequence **or select as required**.

Within this process it is possible to choose the layouts, the images and the colours of your store, as well as to add more complex functionality to your pages such as customised image buttons and customised HTML content, if required.

Step 1 – Site Layout

Step 2 – Categories Layout

Step 3 – Short Product Layout

Step 4 – Long Product Layout

Step 5 – Basket Layout

Step 6 – Checkout Layout

Step 7 – Header Image

Step 8 – Theme Image

Step 9 – Logo Image

Step 10 – Colours and Font Styles

Step 11 – Site Pages and Content

Steps 1 to 8 simply require you to make a selection from the layouts provided (example previews are available), steps 9 to 11 require inputs and a number of selections. You can **change** any of your selections and input **at any time**.

Remember to **Save changes** at the foot of the page each time to update.

	Purpose
Site Layout	Choose the main layout (i.e. design style) of your site. This may include: a header shown at the top of your screens, a theme shown at the sides, a colour scheme for background, or blank (for you to add your own designs). These can be changed at any time regardless of other settings. By default your store will have a navigation bar that will display one set of links to your pages. You also have the option to include a second set of text navigation hyperlinks to mirror the navigation you set up in the store. Check the box labelled 'Include text Links' and click ***Confirm*** to activate the additional set of hyperlinks to appear at the foot of your store pages.
Categories Layout	Choose a layout to display all the categories of your catalogue as well as the Keyword Search and the Currency fields. By default this will be the first page your visitors see **if you do not enter any text on your Home page** (see Step 11 for more details). **Note:** A category will only appear on the layout when products are assigned to the category.
Short Product Layout	Choose a layout to determine: a) How the product 'Short description' is to be displayed

	b) The number of products you wish to display per page in the *Product displayed per page* section. **c)** After setting the number click **Confirm.** **Note 1:** You can change the number products to be displayed per category (see Catalogue.) **Note 2:** Do not make the number of products to be displayed too high as images take longer than text to display and if you have too many on one page, it may cause your shoppers to abort the loading of the page. A maximum of 20 items with images should be displayed in order to keep the page loading times down to a minimum. **Note 3:** Some of the templates are designed for specific products with one variation only and others will require a long product description to be switched on… so be prepared to change your layout to suit. E.g. if you do not intend to use the long description make sure you select a short description layout with a 'BUY' button.
Long Product Layout (Shows after short product layout if shopper selects more information)	Choose a layout if you want to display more information about each and every product. (Clicking on the product name or image in the Short Product Layout will take the shopper to the Long Product Layout.) **Note:** If you wish to show only the short product layout you can turn off the long product layout by un-checking the box labelled '**Display**' and click **Confirm**.
Basket Layout	Choose a layout to determine how the Shopping Basket will be displayed on your site. When shoppers click on the **View basket** link they will proceed to the Checkout page. The shopping basket is displayed on every page once the shoppers have placed their first item in the basket. It can display a list of items, cost of each item and the total cost. The text in the basket layout is fixed and cannot be amended within Click and Build admin. **Note:** Colours selected in step 11 for this layout flow through to the checkout, delivery and order tracking pages.
Checkout Layout	Choose a layout to determine how the Shopping Basket will be expanded in detail once the shopper has clicked on the *View basket* link. This layout is used to provide your shoppers with detailed Checkout instructions and delivery options as well as allowing your shoppers to update the quantity of goods ordered before the order is placed. When shoppers click **Make Payment** they will be sent to a **delivery** page to add delivery information. If shoppers need to amend the order, at this stage, they can click **Modify Order** to return to the checkout. To complete payment shoppers will click the **Secure Payment** button and will be sent to WorldPay's secure payment service to input their card details.
Header Image	Choose the header image for your site from the range of images provided by Click and Build (where you have selected an appropriate store layout template). You can add your own header if required however you will need to have a little knowledge of handling image files: • Click 'Custom image' – at the foot of the categories list. • Click **YES** button (if you are not using custom this **must** be re-set to **NO**)

	• Enter the image ID or **Select** • Select location from the drop down box • Enter background colour code (HEX) e.g. "#FFFFFF" "#336699" • Choose repeat facility from drop down box • Click **Save changes**
Theme Image	Choose the theme image for your site from the range of images provided by Click and Build. This image will be displayed only when the Site Layout (Step 1) allows for a theme image.
Company Logo	Your company logo image can be included here (if required). If the logo image height is bigger than the header image height the header image will be adjusted accordingly. If no Logo Image is specified the Company Name will be used (see Store Settings/ Company Profile). To add, enter ID or use **Select**, click **Save changes**. To delete, uncheck the display logo image box. **Note:** If you need us to design a logo email design@clickandbuild.com
Colours & Font Styles (Also see notes below)	Here you can select: • Font colours • Font styles • Pre-defined colours • Change colour schemes
Site Pages and Content (Also see notes below)	These are the pages that your shopper will be able to access from the navigation bar. Here you can: • Select pre-defined pages to be shown on your store • Assign images and make them visible • Create additional pages • Remove pages

TIP: To see your store at any time click *View store* located in your top right menu bar.

Additional notes for steps 10 and 11

10.1   Colours and Font Styles (Step 10)

You will be presented with 4 options: Font Colours, Font Styles, Predefined Colours and Change Colour Scheme.

Font Colours

Here you can select all the colours for your different text entries.

You also have the option to use a background image as well as colour (the image overlays the background colour). You should select a background colour that best matches the image colour (see Store colours below). Simply enter the appropriate image ID number or click **Select image** then click **Save changes**.

An explanation of the text names:

- **Hyperlinks**

  o **Standard link colour** defines the hyperlinks displayed in the store (except any that you may set up in any text section). Using a different colour from the **Visited link** (see below) makes identification of un-clicked links easier for your shoppers

  o **'On link' colour** defines the colour of hyperlinks when they click once

  o **Visited link colour** defines the colour of a hyperlink after the shopper returns

Note: Store navigation colours are taken from Store colours (see below)

- **Default text** defines all the pre-defined text set up in Click and Build

- **Body text** defines the text **you** enter

- **Category links** defines the colour of these text links

- **Company name** taken from the Company profile entry

- **Discount text** used when presenting discount with products

- **Main heading** used on store screens

- **Sub heading** shows if more than one header

- **Product headers** used when presenting products

- **Navigation text** used in navigation links

- **Short product name** title of short product

Changing Colours

To input a colour click the radio button, then change colour using one of the following:

- Colour palette
- Colour name
- Te Hex or RGB values – to use a Hex or RGB value enter the value then click either **Use Hex Code** or **Use RGB** as appropriate.
- Default colour from the drop down box

Then select the next radio button and colour and continue until you have made all your choices. When complete click **Save changes**. You will be presented with all your choices in a preview screen with the option to **Confirm changes** or **Cancel** and return.

Using very similar colours will render your text invisible on some displays. Stores that are clean, simple and uncluttered are a pleasure to shop in. If you are unsure look at some shopping sites to get some ideas.

TIP: Keep your colour choices simple and complementary. Green text on a red background will not encourage your shoppers to stay in your store for long!

Font Styles

This will allow you to override the default settings for fonts (typeface), sizes and style for the following text names:

- Body text
- Category link
- Company name
- Discount text
- Main header
- Sub header
- Product headers
- Navigation short product name

To change:

- Select option from: Arial, Courier, Times New Roman and Verdana
- Select Size (see notes below)
- Select bold (where required)
- Click **Save changes** to see preview then click **Confirm** to accept or **Cancel** to return.

More than one text style can be changed prior to clicking **Save changes**.

Font Sizes

The font sizes displayed are those used by the browser and do not relate to point sizes that may be displayed in other software such as Word Processors. Size 7 is the largest and size 1 the smallest:

Example Size 1 Font
Example Size 2 Font
Example Size 3 Font
Example Size 4 Font
Example Size 5 Font
Example Size 6 Font
Example Size 7 Font

Tip: Be sparing when making styles **bold** or *italic,* as they should only be used to emphasise a point here and there. There is no underline option as underlined text can be very easily confused with hyperlinks.

Tip: Font size 3 is usually the browser default but size 2 is sometimes preferable to save space. For a more modern look, size 1 can be very effective however this can appear very small and will be hard to read by some shoppers.

> **Tip**: Highlight discounts within your store and use a different colour to the rest of your text. You may wish to make the text bold and increase its size too.

Predefined Colours

These are a 'set of predefined colours' for a ready-made colour scheme that you can adopt to speed the build of your store. Simply click Select and the 'current colour' will change.

Store Colour Schemes

- Background (main site)
- Content pages (background colour)
- Main border
- Navigation bar and basket (same colour)
- Navigation link text (shown with navigation bar)

Customise Store Colours

You can also create your own colour scheme here. You make selections in the same way as the **Changing Colours** section above.

10.2   The Content of your Pages

Your site will be based on the pages you choose and their content (text). When selecting your store layouts you will be selecting certain predetermined content such as the category page and the product pages.

All of these pages are listed on the 'Site Pages and Content' section (Step 11). In addition, here you can **add any additional pages** you need (point 12 below).

> **Note:** Links on the menu bar will **NOT** show if there is no page text to display, except for the 'Main Site Link' and 'Catalogue' links.

> **Note:** For all of the pages listed here you can select one of the font styles previously set-up, the alignment (from the drop down box) and add HTML if required (tick the box if HTML has been entered). Remember to click **Save text changes.**

	Page	Explanation
1	Main Site Link (Shows as Main Website)	If you already have a web site, which you want to lead to your Click and Build store, you can enter its URL in [Store Settings | Company Profile | Web Address] field to allow the shoppers to navigate back from your store to your main site.
2	Home	This is the first page that shoppers will see if it has Text to be displayed. **Note:** If you do not enter any text on this page, Click and Build will display the 'Catalogue' page (6) as the first page of your store.
3	Information	Displays any additional information about your store.
4	Contact	Provides company information to assist shoppers if they run into any problems on the site. The company information is taken from the 'Store Settings/Company Profile' page, so you need to ensure this data is input.
5	Terms and	The "Terms and Conditions" are a requirement of WorldPay and need to be present

	Conditions	before they can activate your store. You will need to enter your Terms and Conditions of sale, including a refunds policy and shipping information.
6	Catalogue	This is the default first page of your store if you do not enter any text for your Home page. This Catalogue page shows all of your product categories including a keyword search box and the currency selector (if these are chosen with Categories Layout).
7	Order Tracking	Customers can enter CART-ID and Email address OR shopper name to access details about their order or download products they have purchased. You **cannot change the text** on this page.
8	Guestbook	The guest book page enables your shoppers to add any comments they may have about the store and its content. This information is registered for your eyes only and only becomes public when you permit. To display Guestbook click **Visible** box. This shows the link and enables shoppers to add comments. To edit and display these comments on your site select the entry and click **Edit** or **Delete**. We suggest you enter your own comment as a shopper to test this feature. See additional notes below.
9	Product News	You can use Product News to display special product related information on your site. Product News items are linked to your products and therefore can be used for 'Special Offers' as well. See additional notes below.
10	Authorisation Page	Once a shopper has paid for the goods and the transaction is 'Authorised' this page will be displayed. A default message will appear to shoppers unless you enter your own message.
11	Cancellation Page	This is similar to the 'Authorisation Page'. However, if the transaction processed incorrectly or fails 'authorisation' Click and Build will display this page. You may wish to add more content to this page to inform shoppers to contact you with any problems they might have had with the order. Set-up is the same as the 'Authorisation Page'.
12	*Create new page* button	You can add additional user pages to your store here. Click **Create new page**. Input Page title and Link text (what is to show in the navigation bar) plus the text for your new page. Click **Create new page** then click **CONTINUE** in the response message. Click **Continue,** you are then taken to step 11 where you can see the new page listed. You then **need** to make your new page 'visible' if it is to be shown on the navigation bar, (check the box and click **Save changes**). To show a new page that is not shown on the navigation bar you need to add an HTML tag **<DISPLAY PAGELINK=xxx>** (where xxx is the User Page ID) in the text of the page where the new page will be accessed from. E.g. Suppose you wanted to link to a full/detailed set of your Terms and Conditions from a summary set of Conditions that shoppers see when they click on the Terms link, you would add the link code shown above to the summary page.

Guestbook

When this page is marked 'visible' then shoppers can record comments by selecting the Guestbook link. Once entered you can vet comments and decide whether or not to publish them on your store (they only appear when you approve).

Within the edit function:

- **Select** a comment to edit from the list
- Click **edit**
- To publish, check **Show this entry on the store?**
- Click **Save changes**
- To delete, select a comment from the drop down and click **delete**
- Click **Confirm** on message page

Product News

To Create News:

- Select **Edit**
- Click **Create news article**
- Enter news article **name** for your reference
- Enter **From / To** dates (these cannot be the same date)
- Check the **Show in store box** (when ready to publish article on your store)

- Add product **ID** (if you want the news article to include a link to a product)
- Add/edit **text** (select style, alignment and HTML as required)

To Edit News:

Same as above but if a 'linked' product is showing another can be added. \In this way you can add as many products as necessary, one at a time.

11 Catalogue

11.1 Introduction

In the catalogue section you are able to; create a folder (for your products), add products, apply discount schemes and product attributes, upload and download product files (if you need) and, finally, create and run reports.

You should start to create your catalogue **after** you have set-up the design of your store along with the parameters you want to apply. E.g. tax, shipping, discounts, instructions, images etc.

Note: One exception applies to Downloadable Goods e.g. computer games, software files etc. In addition to the set-up needs outlined above you also need to have loaded the files first (much like images) and **then** start to build your catalogue. See the Downloadable information later in this section.

It may seem you should start to build your store by adding products first, however if you did you would need to go back to all of the other sections (tax and shipping, discounts, images, etc) to set them up and then apply them to each product in-turn. If you set up all of these sections first each option will be presented to you and you are able to apply each option required as you add products into your catalogue.

Note: Every product needs to belong to at least ONE category… so first create your categories.

The catalogue is organised as follows:

```
Top Category – parent category
  >> Sub Category 1 – child to parent (Optional)
  >> Sub Category 2 – child to parent (Optional)
    >> Sub/sub Category – child to sub category 2 (Optional)
    >> Sub/sub Category – child to sub category 2 (Optional)
      >> Product information
         >> Variation information (price/stock)
         >> Additional information
```

The top-level category is the starting point. When you shopper clicks on the chosen category they will be taken to the appropriate products e.g. CD's, Books, DVD's, etc. If you wish to split this top-level category into smaller sub-categories, it is possible for you to set up 'parent' / 'child' categories. **You can have as many categories and sub-categories as you wish.**

E.g. If you were selling Clothes and Shoes you might have 2 top-level categories called 'Clothes' and 'Shoes'. You could then add 2 sub-categories; 'Shirts' and 'Jumpers' under 'Clothes' and a further 2 sub-categories, 'Ladies' and Gents' under 'Shoes', and so on.

This will provide your shoppers with a smooth 'flow' through your catalogue.

There are a couple of features you need to understand before you start to plan and build your catalogue; **Product Variations** and **Product Attributes** as these may affect the structure and approach you take.

Product Variations

Within Click and Build each product may have variations applied to that specific product.

A variation in Click and Build is defined as **a price or stock control** (for most this generally this means price).

You can apply multiple variations to products. E.g. If you were selling T-shirts in size Medium and Large **and** they needed to be **priced differently** you do **NOT** need to create two identical products, just set-up two variations to apply the different prices. If you are adding variations it is recommended that you name each variation accordingly. In this example the first variation would be called "Medium" and the second called "Large". Detailed information can be found in 'Introduction to product Variations'.

Product Attributes

If you wish to have a shopper attribute applied to a product that **does not affect the price of the product (or stock control - if being used)** you do not need to set up additional product variations. Instead, set-up 'Product Attributes' and apply them it to the product.

An attribute will appear to the shopper as either a drop-down list or a text box requesting the shopper to make a selection or input text. In the above example, if no price difference applied to Medium and Large then adding a 'Product Attribute' would be the best solution.

11.2   Preparation

Before you enter any information it is a good idea to have the following information in front of you:

1. **Category information** – List all of the categories/sub-categories you intend to include.

2. **Product information**.

    a. Product Name

    b. Product Code

    c. Short Product description

    d. Long Product description

    e. Thumbnail image, and large image (these need to be uploaded first under 'Images')

    f. The category/sub the product belongs to

    g. The shipping group the product falls into

    h. The tax group the product falls into

    i. Any discounts that need to be applied

    j. Any attributes/additional variations that need to be included

    k. The price for the product and price variations. If you are using multiple variations you will also need the name of each variations.

    l. Any stock levels applied to the store.

> **Note:** If you set-up a variation with stock checking applied it cannot (at a later date) be reversed (and vice versa). If you need to alter the stock variation in this way you will need to delete the current variation and create a new variation. If you have any problems or require further information please email support@clickandbuild.com

Once you have all of the above information close to hand **and you have set-up discounts, attributes and variations** the next area we need to focus on is the "Catalogue" to set-up your categories and products.

11.3   Create a Category

Click '**CATALOGUE HOME'** then click '**Create new category'** on the page presented.

Note: Categories will only be displayed to shoppers if the category contains at least one product (or their sub-categories).

Category Name (Mandatory)

The category name is displayed to the shopper and will link to the products when the shopper clicks the on the hyperlink text. Enter a descriptive name for the category to prevent confusion for your shoppers. E.g. Books, CD's etc.

Category Position (Optional)

If you associate a category with a position number you can determine the order in which the categories are displayed in your store. By default every category and product entered has a position of "500". This figure allows you to add items before and after the current one. If you leave the 'Category position' at the default (500) then the categories will be presented to the shopper in alpha numeric order. If you set the sort priority to be "1" then it will appear before any of the other products. We recommend that you increment the 'Category position' by a value of "10", which will allow you to insert another item into the list without modifying all the other positions. E.g. If the positions of the categories were 10, 20, 30, 40 etc. then the new category can be created with a position of "35" without having to change any of the original positions (i.e. 10, 20, 30, **35**, 40, etc.).

Number of Products Displayed in this Categories Per Page (Optional)

By entering a number in ***Number of products displayed in this category*** you can specify the number of short product descriptions displayed per page for that category. We recommend a maximum of 20 products with small images should be displayed on any one page or 50 products without images.

Active?

When checked the category is visible to shoppers (if it or its sub-categories contain products).

Note: When you need to update products within a category after your store is live we recommend that the category is made inactive beforehand. This will make the category and all its products invisible in your store until reactivated.

Category Description (Optional)

If used the description will be displayed at the top of the category's short product page to provide the shopper with a more detailed summary of the products within that category. Enter the description as a standard text, change font, styles etc. If you include HTML then make sure you tick the box.

Parent/Child Category Options (Optional)

Using this drop down list you can state that your new category is a sub-category (child) to a parent category, thus obtaining a structured method of breaking down your product inventory into smaller categories (see Catalogue Preparation above). If 'None' is selected then the category will be set up as a parent.

 Category Image (Optional)

Use this if you have decided to include an image as the link to a category in place of text.

To enter an image insert the ID if known or click **Select image** to find the image.

Category and Sub category View / Edit

- Click **CATEGORY HOME**
- The catalogue tree will be presented. Alongside the category you can, click **Edit**
- Make changes
- Click **View** to view the Store as shopper

> **Note:** Use **Edit** to include a *sub category* or '*child*' to your chosen category. Click **Create child category** near the foot of the page and complete the new category form displayed. This will be created as a child to the now parent category.

Deleting a Category

- Click **CATEGORY HOME**
- The catalogue tree will be presented. Click **Delete** alongside the category required. (A warning message will appear when sub-categories exist, or it contains products.)

11.4 Create new product

Once you have set up the categories you can create and add products. Click **Create products** in Catalogue menu.

Product Name (Mandatory)
The product name is displayed to the shopper and is hyper linked (as is the associated thumbnail image), to an area displaying the long description and a larger size image of the product (if used). The product name is displayed within the basket once a shopper has made a purchase so it is recommended that you be fairly descriptive with the product name.

Product Code (Optional)
Use this if you wish to implement product part numbering. You will then be able to run a report (through the "Reporting" section) on the product code order. Please note: This is not displayed on the confirmation email you or the shopper receives, and it is not on the store.

Product Position (Optional)

If you associate a product with a position number you can determine the order in which the products are displayed in your store. By default every product entered has a position of "500". This figure allows you to add items before and after the current one. If you leave the 'Product position' at the default (500) then the categories will be presented to the shopper in alpha order or numeric order. If you set the sort priority to be "1" then it will appear before any of the other products. We recommend that you increment the 'Product position' by a value of "10", which will allow you to insert another item into the list without modifying all the other positions. E.g. If the positions of the products were 10, 20, 30, 40 etc. then the new product can be created with a position of "35" without having to change any of the original positions (i.e. 10, 20, 30, **35**, 40, etc.).

> **Note:** The product position operates independently within each category. This means you can always give the same product position values in different categories.

Search Keywords (Optional)

Shoppers can search your catalogue using either the category listing or the keyword search. If you do not want to operate a search facility ensure you select the appropriate Category template (see Store Design). The more keywords you enter the better the search facility will perform as it helps your shoppers to find products. The search will compare each word entered within the keyword search box by your shopper. This means that you will need to enter all of the words that shoppers "may" enter. E.g. If you sell computers the search terms might include; Computer, System, Monitor, Ram, CD-ROM, Keyboard, Mouse etc.

For these keywords you would need to enter the following information into the "**Searchable keywords**" box; `computer system monitor ram cd-rom keyboard mouse Dell dimension 3412 pentium p4 1.2Ghz`

This would be fine, however most shoppers will not enter exact keywords or misspell words. To help solve this problem it is recommended that you put as many permutations of words in as possible. A prime example above is "cd-rom", for a shopper to find the product using this term they would need to enter the word correctly. However shoppers could input "cd rom", "cd", "rom", "cd-roms". To help your shoppers all of these phrases should be included. Doing the same for every word would produce something like;

computer computers comp system systems monitor monitors ram cd-rom cd rom cd-roms keyboard keyboard key mouse mice mouses dell dimension 3412 341 34 3 pentium pentiums p4 p 4 1.2ghz 1.2 ghz hz

> **Note:** You do not need to repeat any keywords and do not enter commas.

Active? (Optional)

When checked the product is active (visible) to shoppers. To make products inactive in your store simply un-check the '**Active?'** box. When the product is not active the product is not visible in your store.

Category Information (Mandatory)

Use the drop down list and select a category. Products may exist in multiple categories, this is established when you '**Edit**' the product.

When creating or editing there is the option to define how long the product is be visible on the store, if you leave this option blank the product will appear indefinitely.

Variation Information

> **Note:** If you need to add additional multiple variation prices for a single product e.g. you intend to apply different charges for different sizes, OR you need to manage different stock levels, FIRST create the product here and then use the **Edit** function once it is listed under Category Tree to create a variation.
>
> **FOR DETAILS - SEE VARIATIONS AT THE END OF THIS SECTION**

Product Price (Mandatory)

Will be shown in the base currency you set up with WorldPay. Enter the price in the *base Currency* (the currency that your store was set up with) for the product, this will then be re-calculated automatically for the shopper dependant upon the shoppers currency choice when they enter your store. As the exchange rate variations are handled via the real-time link to WorldPay the prices displayed to your shopper may vary from day to day.

When entering price do not enter any currency symbols, simply enter the cost. E.g. for a price of £4.89, enter 4.89

Product Type

Choose either hard good (a product that has to be physically shipped to your shopper) or downloadable good (a piece of software or information that can be downloaded from a virtual page) from the drop down list provided. If you select 'Downloadable Good' you will be prompted for:

1. The file details (previously set up, see Downloadable Items section). If your product is downloadable, then you will need to select the downloadable file by finding the relevant file from the drop down lists or by typing in the file ID number (if known). This file will be available to the shopper after payment has been taken.

2. Allow access to purchase for – is the length of time to allow shopper to download. This is where you enter the amount of days/hours that your shopper can access the virtual page to download their purchased file.

3. Any shipping costs to the downloadable item? – Enables downloadable goods to be both downloaded and physically shipped to your shopper as normal hard goods. For example you may need to send a hardcopy manual to accompany the software and therefore need to charge shipping. This can also be useful if you wish to capture delivery information.

> **Note:** While in development your store will normally be set to 'Test' mode. If you load "live" downloadable goods onto your site then anyone that accesses the URL address can order downloadable goods by making a test transaction. So if you intend to upload downloadable goods before your site is live, make them inactive (See the *Catalogue section* for details) or use downloadable material of no value during the test phase.

Use Stock Checking
Tick the ***Use stock checking*** checkbox if you want Click and Build to maintain the stock level on this product variation. This will display if the product is available and provide you with low stock or stock depletion emails.

1. **Initial Stock**
    Enter the initial amount of stock. This value will then be displayed in your store.

2. **Re-order Level**
    When a shopper adds a product to their basket the available stock level will be depleted.

Ensure you select the appropriate **Category Layout** to show stock level.

Short description (Optional)

Dependent on the short product layout selected (see store design) the short description is displayed in the initial product page presented to your shoppers. You have the option here to add text, select style and font and add HTML if required.

To add a thumbnail image enter the ID or browse to select from your image library. The image will be displayed alongside the short description.

> **Tip:** The short description area is the page that the shopper will use to identify the product **so it needs to load quickly**. Use a small image of the product (approx 100 x 100 pixels) and minimal descriptive text. Use a larger/different image (approx 250 x 250 pixels) and full details in the long description. The more information entered here the better since shoppers will usually require as much information as possible to help make their decision.

Edit a Product

- Locate the product in the **Catalogue Tree** <u>or</u> use the **Find a product** facility
- Click **Edit**

Note: When in edit you can **add** the product to **other categories**. You may also **add** a variation to the product, click **Create new variation**.

11.5   Additional Options

Long description (Optional)

To use this check the Enter long description box, the layout is identical to the short description. The long description is displayed when the shopper views the short product page and clicks on the Product Name or thumbnail image.

The purpose of the two description areas can be illustrated with a CD example: The CD title and artist could be entered in the short description with further details like the tracks and other CD's by the same artist listed in the long description.

Note: If you enter track listings or lists in general, use one of the list formats (in the select text alignment options) to display it properly. A mix of images and different text styles can give your product descriptions a professional output.

 Additional Parameters (Optional)

To apply any of the following check the 'Additional parameters' box and a form will open. You also have the option to change and remove selections by resetting the parameters chosen.

Note: 'none' = no selection.

Weight (Optional field entry)

This is the weight of the product and is a required entry if you intend to charge shipping by weight. See Shipping section under Tax and Shipping (Store Settings). Ensure that the unit of weight used here is the same as that defined for the shipping calculations.

Tax Group (Optional – Select from drop down list)

This parameter is used to apply a previously defined tax group to the product. Details can be found in the Tax and Shipping section.

Note: If any of your "Delivery Options" include a tax group you will need to select it here. This Tax charge will only get applied to the shopper if they select the dispatch choice that includes the tax element.

Shipping Group (Optional)

This parameter is used to apply a previously defined shipping group to the product. Details can be found in the Tax and Shipping section.

Select from drop down list.

> **Note:** This is a required field if you are charging for shipping at 'Item level' or 'Group level'. If you are shipping at 'Whole order level' you do not have to enter a value **however** it is good practice to apply a shipping group anyway as you may decide to introduce or change a shipping method at a later date.

Discount (Optional)

This parameter is used to apply a previously defined discount scheme to a product. A description of the discount set-up and use is given in the Discount Options section.

Message shows if no discount has been created.

Product Attributes (Optional)

To apply attributes to a product, select the name of the attribute (you previously set-up) or select multiple attributes by holding down CTRL (PC users only) or the apple button (on Macs) and select/deselect the attributes in the list as required. Message shows if no discount has been created.

11.6   Adding a Product to Additional Categories

A product can belong to several categories to provide shoppers with multiple routes to finding a single product although the stock level will be maintained regardless of how many categories the product resides in:

- **Select** the product under the **Catalogue Tree** or use **Find a product** (enter name)
- Click **Edit**
- Under the heading 'Category information' click **Show in another category**.
- **Select** category from drop down box
- Insert **date** (default will be current date)
- Add number of **days** (optional) – if left blank product will show until removed
- Click **Create category entry** to update
- Message displayed

> **Note:** By including a time frame for a product's duration in a category, you can highlight new stock for a limited amount of time. By adding a product to more than one category you can also provide your store with an 'easy to find' product structure for shoppers, as many products could fall into multiple categories.

11.7   Introduction to Product Variations

When you set up a product you will have entered a price (and/or) a stock figure. After you have set-up a product you are then able to add variations to that product.

Variations are used to add sub-classifications to a single product that alter by **price or stock levels**. E.g. size variations, colour variations. Another example might be Videos and DVD's as the film would be priced differently for each type. You can have as many variations as required.

> **Note:** If the **price or stock level is NOT affected** then multiple variations should be set-up using the "**Attributes**".

> **Note:** For associated products, such as batteries for electrical equipment, or accessories for audio/video equipment, a variation can be used to show the accessory (variation product) alongside the 'parent' product.

11.8   Create a Variation

- Click **Find a product** in Catalogue menu or from the tree (**Catalogue Home**)
- Select the product from the drop down list
- Click **Edit –** You will be presented with the product details as originally set-up
- Find the heading 'Variation information' click **Create product Variation**.

You will be presented with the following parameters:

Variation Description

As you are adding another variation to an existing variation, you need to provide the variation's description. Enter something descriptive, as this will be displayed to your shoppers. It is recommended that you keep the variation name short.

Variation Price

Enter the price in the *base Currency* (the currency that your store was set up with) for the product, this will then be re-calculated automatically for the shopper dependant upon the shoppers currency choice when they enter your store. As the exchange rate variations are handled via the real-time link to WorldPay the prices displayed to your shopper may vary from day to day.

When entering price do not enter any currency symbols, simply enter the cost. E.g. for a price of £4.89, enter 4.89

Active?

When checked the product variation will be visible to shoppers. To temporarily stop the variation from being purchased on the store simple un-check the **Active** box. The variation is still displayed but no BUY button.

Product Position

If you associate a variation with a product position number you can determine the order in which the variation is displayed in your store. By default every variation entered has a position of "500". This figure allows you to add items before and after the current one. If you leave the default (500) then the variation will be presented to the shopper in alpha order or numeric order. If you set the value to "1" then it will appear before any of the other variations. We recommend that you increment the 'Product order ' by a value of "10", which will allow you to insert another item into the list without modifying all the other positions.

Apply a Discount Scheme

This parameter is used to apply a discount scheme to a particular **variation**. A description of the discounts set-up and their use is given in the Discount Options section.

Apply Attributes

can be applied to variations. This enables shoppers to select different versions Different attributes of a particular attribute (or instruction) e.g. the choice of colour or making a size selection. Simply select the attribute name or select multiple attributes by holding down the 'CTRL' key (PC users) apple button (MAC users) from the list provided. Set-up is covered in the Product Attributes section.

Use Stock Checking

Tick the ***Use stock checking*** checkbox if you want Click and Build to maintain the stock level on this product variation. This will display if the (variation product) is available and provide you with low stock or stock depletion emails.

1. **Initial Stock**
   Enter the initial amount of stock. This value will then be displayed in your store provided you have checked the ***Use Stock Checking*** box above.

2. **Re-order Level**
   When a shopper adds a product to their basket the available stock level will be depleted.

> **Note:** If the shopper subsequently leaves the store without ordering or their payment is unsuccessful the stock level will be restored after a timeout period of 30 minutes.

When the stock level reaches the re-order level, an (optional) email will be sent to you by Click and Build advising you that your stock is low and should be replenished.
When stock is completely depleted, no quantity input box for ordering that product will be displayed to shoppers until the stock level has been replenished. Total depletion of stock also triggers an (optional) email to you. See the Store Settings section for more details. To replenish stock, use '**Edit variation'** within the Quick Edit function (from the Catalogue menu).

Product Type

Choose either hard good (a product that has to be physically shipped to your shopper) or downloadable good (a piece of software or information that can be downloaded from a virtual page) from the drop down list provided. If you select 'Downloadable Good' you will be prompted for:

1. The file details (previously set up, see Downloadable Items section). If your product is downloadable, then you will need to select the downloadable file by finding the relevant file from the drop down lists or by typing in the file ID number (if known). This file will be available to the shopper after payment has been taken.

2. Allow access to purchase for – is the length of time to allow shopper to download. This is where you enter the amount of days/hours that your shopper can access the virtual page to download their purchased file.

3. Any shipping costs to the downloadable item? – enables downloadable goods to be both downloaded and physically shipped to your shopper as normal hard goods. For example you may need to send a hardcopy manual to accompany the software and therefore need to charge shipping. This can also be useful if you wish to capture delivery information.

> **Note:** While in development your store will normally be set to 'Test' mode. If you load 'live' downloadable goods onto your site then anyone that accesses the URL address can order downloadable goods without making any payment. So if you intend to upload downloadable goods before your site is live, make them inactive (See the *Catalogue section* for details) or use downloadable material of no value during the test phase.

Variation View/Edit

- Click **Catalogue Tree** to select the product variation click **Edit**.
- Then click **Edit existing product.**
- Scroll down to the **'Variation Information'** – variations for that product will be listed
- Click the **Edit** button alongside the variation you wish to review
- Change any of the parameters originally established
- Click **Save changes**

11.9   Quick Edit (All products)

Once you have products within your store this function allows you to edit the **key data** for **all** products. Click **Quick edit all products** in the Catalogue menu.

Quick edit options include:

1. Product name – links directly to **edit** product
2. Product ID – information only
3. Active? – shows in store category
4. Variation name – links directly to **edit** variation
5. Variation price – amend here
6. Current stock level – information only (shows if function selected)
7. Alter stock level – to change use +/- number to add or subtract from current stock
8. After changing the details click **Save changes** to update.

You can view and edit any of the product or variation details in full by clicking on the relevant product name (hyperlink).

> **Note:** There is also a 'Quick Edit' button within the **Product options** in the Catalogue Tree. **This should be used whenever possible** as this significantly improves the speed of downloading to your browser.

11.10   Find a Product (To edit)

Click **Find a product** in the Catalogue menu. Select a product from the drop down box. Click **Edit** to view/update the product as required. You can also find a product using the Catalogue Tree.

11.11   Product Attributes (Create)

The use of product attributes is explained at the top of this section. To create a product attribute:

- Click **Product attributes** in the Catalogue menu
- This will list any attributes previously created plus a **Create product attributes** button
- Click **Create product attributes**
- Enter **Description** to be shown to the shopper in the basket e.g. Colour selected
- Add a text **Prompt** to be shown to shoppers in the product pages e.g. Select Colour

- Enter **Attribute position** – If several attributes are to be presented you can determine the position as presented on the page to the shopper (defaults to 500)
- Select **Type** radio button
  - o Shopper text input e.g. message for a gift tag
  - o Select from drop down box e.g. Red, Green, Blue. As the system shows lists in alpha/numerical order we suggest you input '--Select--' as an option. This will then show at the top of the list.
- Additional fields will show as appropriate
  - o Text field length
  - o Mandatory input (shopper must input to complete transaction)
  - o Field values for list (**one entry per line**) e.g.
    - ▪ --Select—
    - ▪ Green
    - ▪ Red
    - ▪ Blue
- Click **Save changes**

Note: To **apply** a new attribute to an existing product use **Find product** or the Catalogue Tree and click **Edit.** Tick the **Additional information** box and you will be presented with a drop down menu with all the attribute options you have set-up. Select the attribute option required and click **Save changes**.

11.12 Discount Options

You may define as many different discount schemes as you need based on the options outlined below. Once set you can then apply them to each product when you create your inventory OR apply one discount scheme at the basket level i.e. apply the discount to ALL products within the basket.

Note: Where a discount is to be applied at basket level then only 1 discount scheme can apply.

Methods of Discounting

Click and Build has three different methods of discounting:

- **X** items for the price of **Y** items e.g. 3 for the price of 2
  If this is applied at "Basket level" the discount will work on all products added to the basket. If you apply this at "Product level", shoppers will need to purchase 3 of the same product to receive the discount.
- **X**% discount on goods with a total value over **Y** e.g. "10% off if you spend over £100". This discount works well as a "Basket" discount. If it is applied at "Product level" then a shopper will need to purchase more than the **y** value for that particular product to receive the discount.
- Free shipping on orders over **X** value e.g. Free shipping if you order over £100 worth of goods. This discount is best applied at the Basket level, as it will provide a free shipping option if the total cost of the basket is above **x**.

Create a New Discount (scheme)

- To create a discount click **Discount Options** in the Catalogue menu. This will list any previously created discount schemes with links to edit.
- Click Create product discount. This will show:
  - o **Discount description**
    Add description to be seen by shoppers E.g. 3 for 2 on this product today!
    (Where this is seen by shoppers will depend on the level at which the discount is applied – Basket level or product level.)
  - o **Valid dates**
    Add 'from' date and 'number of days discount is to run' (leave blank if discount is to continue for an infinite period).
  - o **Select type**
    Choose from one of the 3 options
    - ▪ **Discount X for Y**
      Select items X/Y and product value to be refunded (highest or lowest).
    - ▪ **Discount Percentage %**
      Enter values X/Y and at what point the discount is to apply, before tax is added or after – if tax is not being used select 'post tax'.
    - ▪ **Discount 'Free shipping'**
      Enter value and 'pre' or 'post' tax (see above)
- Click **Create discount** You will then be presented with the discounts for you to edit if necessary, PLUS the **Global discount options**

Global Discount Options

- Is discount to be applied pre-tax calculation or post-tax calculation?
- Is discount to be applied at basket level or product level? If basket level then clearly only ONE discount scheme can be applied – multiple discount schemes may apply when operating at product level and assigned to products
- Select scheme from drop down box
- Remember to click **Save changes**

> **Note:** To **apply** the discount to an existing product find the product in the Catalogue Tree or use Find Product and click **Edit.** Tick the **Additional information** box and then select the discount scheme you have set-up from the drop down box. Click **Save changes**.

To Edit / Delete
The discount schemes will be listed on the discount page, identify the discount required and click Edit or Delete. You will be asked to confirm any deletions.

11.13   Upload Product Database

If you have a large pre-existing inventory, a quick upload facility is available via a CSV (Comma Separated Values) file. This is a common output format used by the market leading spreadsheets and databases. The format for the CSV file is set out in *Appendix A*.

Before you start you will need to have populated your image libraries, any downloadable goods, tax, shipping, discounts and attributes before compiling your CSV file. The catalogue folders must also be present so that the unique system generated ID numbers are available.

1. Select **Upload product database** from the Catalogue in the menu bar.

2. Click *Browse* to search for the CSV file that you intended to upload

3. Check the **Test** box on the first pass for the system to check the file

4. Click **Upload inventory** to submit.

5. If no errors **remove Test** status and re-load file

> **Note:** The Test Mode default is set to ON and should only be turned OFF after you have checked the uploaded data for errors. This will also stop any products from being accidentally altered on your store. Only turn Test Mode OFF and resubmit your file you have checked for errors.

Errors – Rejected Items

A rejection message followed by an input box enabling you to edit the product data will be presented at the foot of the page. The rejection messages are listed in *Appendix A*.

Each rejection will include a row number that relates to the lines in the text input box and a file row number that relates to the original CSV file. It will also show a product, variation and category number (if present on that line). Following amendment these items can be resubmitted. This cycle can be repeated until the process is complete and you have 'cleaned' all the data.

Successful Process

After a successful upload of data, you will see 4 items of information the message box:

1. The name of the file that has been uploaded, e.g. c:\inventory.csv

2. Notification of whether products exist and have been edited

3. Notification of whether variations exist and have been edited

4. Summaries of products that have been added

Warnings may immediately precede the information for individual products. These signify data lines, which the system cannot interpret fully but that are not critical enough to force a rejection.

> **Note:** The CSV upload is not recommended for computer beginners. For more information about the CSV upload utility please email support@clickandbulid.com

11.14   Download Product Database

If you have a large number of products in your store and need to modify them you may prefer to import the database it into another system or simply update other spreadsheets. In these circumstances it may be easier to download the data via a CSV (Comma Separated Values) file. This is a common output format used by the market leading spreadsheets and databases. The format for the CSV file is set out in *Appendix A*.

1. Select **Download product database** from the Catalogue in the menu bar.

2. Your BROWSER will open a file download function window. Click **Save**.

3. You then need to define the file path and confirm file name. **Ensure the file includes the .csv extension**. Click **Save**.

Also see **Catalogue Reports** later in this section as CSV files can also be created here.

11.15   View Orphaned Products

An orphaned product is a product that is not assigned to any category and therefore cannot be seen by a shopper when choosing a category. However, it can be found via the search facility.

The report will display each product with the name its ID number and 3 options; Edit, Move and Delete.

1.   To edit a product click **Edit**.

2.   To move it to a new category click **Move**. You will be presented with a pop-up window with a drop down box listing all the categories, click **Select** *to* apply your chosen category.

3.   To delete an orphaned product click **Delete**. (Warning box will appear.)

4.   To delete all orphaned products click **Delete all orphaned products**. *(*Warning box will appear.)

11.16   Product Reporting

Once you have set up your catalogue its category folders and product folders you may wish to create your own product reports.

The Click and Build Catalogue Reports section enables you to build your own reports. The report can be saved, viewed, printed or deleted after initial use. You can also download reports in (CSV) comma separated value format. These CSV reports can be imported into programs like Microsoft's Excel or Access, which enables you to create an offline inventory.

The report writing facility operates with three types of input criteria:

- **Report Items** – Output using <u>any items</u> relating to products e.g. a product report listing all the products listing **Product Name, ID and Price**.

- **Report Filters –** Output with <u>filters</u> applied to items on catalogue report e.g. the product report **for products over £10.00.**

- **Sort Options –** Output using <u>sort</u> parameters e.g. the product report above over £10 and **in product ID order**.

 Add/View/Edit a Product Report

This follows the same structure as the Order Report section below but contains product items in the drop down data fields. For full details on how to use the report generation tool for product reporting see the <u>Orders section (Order Reports)</u> below.

12   Downloadable Items

Downloadable items are digital software, music, documents, images etc. that can be downloaded by the shopper following a successful order transaction.

Downloadable goods are uploaded and administered in a similar fashion to the Image Library. The upload method and allocation of ID numbers (for later attachment to products) is also very similar.

A time limit is attached at product set up level, which dictates the amount of time the download link to the file is available to shoppers, after payment has been processed. Only after a transaction has been authorised can the download commence.

Download times are determined by the shopper's connection speed (see table below).

12.1   Guideline Download Times

ConnectionD evice	Connection Speed	File Size					
		100K	**500K**	**1MB**	**1.5MB**	**2MB**	**5MB**
Mobile	9600 bps 9.6 Kbps	1 min. 25 sec.	7 min. 7 sec.	14 min. 13 sec.	21 min. 20 sec.	28 min. 27 sec.	71 min. 7 sec.
PDA	14400 bps 14.4 Kbps	57 sec.	4 min. 44 sec.	9 min. 29 sec.	14 min. 13 sec.	18 min. 58 sec.	47 min. 24 sec.
Split line	28800 bps 28.8 Kbps	28 sec.	2 min. 22 sec.	4 min. 44 sec.	7 min. 7 sec.	9 min. 29 sec.	23 min. 42 sec.
Variation (Modem)	33600 bps 33.6 Kbps	24 sec.	2 min. 2 sec.	4 min. 4 sec.	6 min. 6 sec.	8 min. 8 sec.	20 min. 19 sec.
56k Modem	56000 bps 56 Kbps	15 sec.	1 min. 13 sec.	2 min. 27 sec.	3 min. 39 sec.	4 min. 53 sec.	12 min. 11 sec.
ISDN	128 Kbps	6 sec.	32 sec	1 min. 4 sec.	1 min. 36 sec.	2 min. 8 sec.	5 min. 20 sec.
ADSL	512 Kbps	1.5 sec.	<8 sec.	<16 sec.	<24 sec.	<32 sec.	1 min 18 sec.
T1	1.5 Mbps	<1 sec.	3 sec.	5 sec.	8 sec.	11 sec.	27 sec.
T3	45 Mbps	<1 sec.	<1 sec.	<1 sec.	<1 sec.	<1 sec.	1 sec.

12.2   Download Items

First of all, **folders** have to be created within the DOWNLOAD ITEMS section before you can add downloadable goods. It is recommended that more than one folder be used, enabling a more structured download inventory. In addition to single files, Click and Build will upload Zip files (Zip files contain many files). This can speed the set-up process enormously.

TIP: Deleting multiple downloads in one action from a folder is not possible. For large download catalogues deleting downloads could become very time consuming therefore we recommend the use of multiple folders to allow you greater control of your library and ease of reference.

Adding a Download folder:

- Click **Create new folder**
- Enter the new folder name in the field
- Click **Create new folder**
- Confirmation message received
- Click **Return to downloads**

Adding a file (product):

- Click **Upload** alongside the folder selected
- Click the *Browse* button to search for the appropriate file (or enter location)
- Select file from your computer and click *Open* – file will be added to window
- Enter **Description**
- (Ignore the Unpack *Zip Archive* box)
- Click **Upload new item**

To upload a Zip file:

- Click **Upload** alongside the folder selected
- Click the *Browse* button to search for the appropriate Zip file (or enter location)
- Select file from your computer and click *Open* – file will be added to window
- Enter **Description**
- Check the **Unpack *Zip Archive*** box
- Click **Upload new item**

Once the file has been uploaded it is automatically unzipped, and the folder populated with all the items in the Zip file. Should you wish to find out more about Zip archiving software visit http://www.winzip.com

Edit Products

- Select **Folder**
- Click **+** to open folder
- Click on dropdown window
- Select item from dropdown window
- Click **Edit/View/Rename** – action as indicated.

Delete Products

- Select **Folder**
- Click **+** to open folder
- Click on dropdown window
- Select item from dropdown window
- Click **Delete** – action as indicated
- Confirm action or cancel

Note: You cannot delete folder if downloadable items are present but you can **Rename**.

Note: The name of the downloadable item needs to include the file extension and crops at 30 characters.

Note: If you enter a description it will be used for all the files from the zip file, however, for each download the description label changes by allocating a unique sequential number suffix.

Note: If you are going to upload your products through a csv (comma separated value) file then you will need to know the ID for each download item to add to the .csv file.

Important: While you are developing your store it will normally be set to test mode. This will enable you to test all of it's functionality including connection to the payment gateway but the gateway will **not** debit any cards used in transactions.

If you load "live" downloadable goods onto your site, then anyone that knows or finds the URL of your site can order and download goods without making any payment. So if you intend to sell downloadable goods make them inactive and/or use downloadable material of no value during testing

13   Orders

This section provides a range of admin functions to assist you with order processing.

It is important that when you receive orders you update order records. Your stock level will be maintained automatically by Click and Build (if selected) but you must inform the system using the Order Functions when you have shipped your goods to your shoppers. (This of course does not apply to downloadable goods.)

This will keep your shoppers informed of their order status by means of automatic emails (when shipping is complete) and when they make enquiries themselves via the 'Order Tracking' menu option should you decide to make this option available.

A number of functions are provided and are listed in process order.

13.1   Authorised (Uncompleted) Orders

Uncompleted orders have been authorised by WorldPay but have yet to be 'completed' (shipped) by you. When you ship the goods to the customer it is recommended you update the order status here to 'Completed Orders'. In this way those orders that are listed as 'Authorised/Uncompleted' will always be new orders that you have yet to dispatch.

To complete an individual order check the **Complete** box OR check the **Complete All** at the foot of the page and click **Update orders**.

You also have the ability to automatically send an email to the shopper (or suppress it) using the tick box.

Note: View Order

Every form listed in this section allows you to **view** the order. This will present the transaction details for the order selected with the ability to:

- Change shopper details such as delivery address etc.
- Send an email direct to the shopper
- Change the status of the order e.g. mark as REFUND
- Record your own comments
- Input comments for the shopper to read under 'Order Tracking' (if set ON)

Remember to click **Update order** at the foot of the page to accept.

13.2   Completed Orders

Completed orders are those that have been dispatched and you have set as 'complete'. This form allows you to view the orders and archive them (see Archive below).

13.3   Archived Orders

Once you have completed an order and you do not wish to view the information regularly specify the order as 'archived'. The 'archived' orders continue to be available but archiving will ensure that all the other functions hold the more recent transactions.

13.4   Archive Deletion

To keep the order database within reasonable size limits, the option to drop off archived orders (within a date range) is provided on the archived order screen. When deleting, a **confirm deletion** pop-up is displayed to avoid accidental deletions. Once deleted from archive records cannot be retrieved.

13.5   Refunded Orders

If you have to make a refund for a particular order within your WorldPay account it is recommended that you ALSO mark the order as 'refunded' within Click and Build. This way you will be able to display all the orders that you have refunded quickly and easily.

How to make Refunds

When payments have been made from the store into your WorldPay account you can make a refund using the Customer Management System (CMS). Refer to the CMS User Guide or contact WorldPay customer services (0870 742 7002) for information about refunds.

> *Note:* Setting the status of the order to 'refund' within the Click and Build administration will **NOT** refund the order through your WorldPay account.

When an order has been refunded using CMS you will then need to mark the order as refunded in the Orders section of Click and Build. Click View order and select Refunded under Additional Options | Mark order as. Remember to click Save changes.

> **Note:** If you refund an order within your CMS WorldPay account it will **NOT** automatically update your Click and Build store. You will need to make this entry.

13.6   Disputed Orders

If you are querying the validity of an order it is recommended to mark it as 'disputed'. This will allow you to see any orders that you are having problems with quickly and easily. Once you have resolved the dispute you can either 'complete' the order or mark it as 'refunded'.

13.7   All Orders

If you wish to view all orders use this function. Use of this function is **not recommended for stores dealing with large volumes** of orders due to the amount of time it may take to show the results. If you keep an ordered structure using the above functions you can run quicker reports on a specific order status.

13.8   Search Orders

This can be used to look up order enquiries quickly should your shoppers contact you with a query at any time. To query an order simply enter the 'Order Number' **or** the 'WorldPay transaction ID' **or** the 'Shopper's reference' and click **Find order**.

13.9   Order Reports (Create and view)

Once you have started selling items you may wish to create your own transaction reports.

The Click and Build Order Reports section enables you to build your own reports. The report can be saved, viewed, printed or deleted. You can also download reports in (CSV) comma separated value format for input to other systems.

The report writing facility works using 3 types of input criteria:

1. **Report Items** – Output using any items on the order e.g. A sales report showing **Gross Amount, Tax, Totals and Post Codes**

2. **Report Filters –** Output using filters applied to items on the order e.g. The sales report above **for orders over £10.00 and under £100.00**

3. **Sort Options –** Output using sort parameters e.g. the sales report above over £10 and under £100 but in **Post Code Order**.

Create Report

To create a new report, select **View order reports** and click **Create order report.** On the new page enter the title and click **Save changes**. You will be presented with a new page for your input criteria (see below).

> **Note:** The title entered will be printed at the head of the report.

1. Report Items

This enables the selection, positioning order, totalling and formatting of the data items that make up your custom report. An explanation of the settings is provided below:

Report Item	Choose the data item from the order and catalogue list in the drop down menu that you wish to display as a column on your report.
Column Header	Enables you to name the column heading
Insert	The insert drop down list determines the positioning of the newly added column in relation to those already inserted.
Count	Gives a count of the number of items selected. Only one count is allowed.
Break	Creates a break in the text for counts or totalling. Only one break is allowed.
Subtotal	Prints a total of all numeric items since the last break.

	Note: Selecting this option for a non-numeric field will produce a count.
Total	Prints a grand total of the numeric items in the report. **Note:** Selecting this option for a non-numeric field will produce a count.
Suppress Repetition	Will prevent the report from displaying duplicate records in the same column, which is useful in reports with sorted columns. This function can prevent the same product or customer name being printed over and over.

Note: When producing an Order Report, some of the data fields that can be added to your report as columns are calculated fields. The following calculations describe how the data items are produced:

Item
Item Shipping + Item Shipping Tax = **Item Shipping Total**
Item Cost - Item Discount + Item Shipping Total + Item Tax = **Item Total**
Item Unit Cost x Item Quantity = **Item Cost**

(Note: the Item Unit Cost is what it was at the time the order was confirmed by the customer - the variation price is what it is now.)

Order
   Order Shipping Cost + Order Shipping Tax = **Order Shipping Total**
   Order Cost (including discount) + Order Shipping Total + Order Tax = **Order Total**

After adding a column and selecting any options for this column report click the Save changes. The new column will now be featured in the display menu giving you the ability to rapidly change any of the settings. To add another column click Add report item and repeat the process until you have all the columns set-up for your report.

Edit/Delete

To edit/delete entries check the required radio button or box in the display and click Save changes. To disable a radio button check the Disable button.

2. Report Filters

This menu enables you to filter the report so that only selected items from the database are displayed.

Add Selection	Choose from the drop down list the data field that you wish to make part of your selection criteria.
Criteria	From the criteria drop down list select a logical operator to apply to the selection criteria.
Value	Enter a value that will be used in conjunction with the selection and criteria e.g. a Shopper's Name Equal To Smith, a Product Name Not Equal to CD (here, Smith and CD are the values). Note: A number of selections simulates an 'And' type report, i.e. Selection A and

	Selection B will be printed, whereas values entered into this field separated by commas simulate an 'Or' type report, i.e. Selection A or Selection B will be printed. If at runtime, no values are entered into Value, no data will be printed.
Insert	The insert drop down list determines the positioning of the newly added column in relation to those already inserted.

After adding a filter click the Save changes. The new filter will now be featured in the display menu giving you the ability to rapidly change any of the settings. To add another column click Add report item and repeat the process until you have all the columns set-up for your report.

Edit/Delete

To edit/delete entries amend the selected entry or check the box required in the display and click Save changes.

3. Sort Options

This enables you to sort the output into a preferred order. Click Add sort option and select the field from the drop down box. Check Reverse order if required, use Insert to decide on position (relative to other selections) and click Save changes.

This enables you to determine how the rows within your report are ordered. For example, by setting the sorting initially on the product name, and then sorting on a variation, the report will display the rows in alphabetical order, first on the products name and then by the variation. You can however, reverse the order in which they are displayed i.e. from A-Z, to Z-A, by clicking the *Reverse Order* checkbox when adding each of the sort options.

Edit/Delete

To edit/delete entries amend the selected entry or check the box required in the display and click Save changes.

13.10   Report Options

(Displayed on Order 'Home' Page after report set-up)
All the reports you set-up will be listed on the Order 'home' page along with 4 options:

- **View** – view on screen (you can then print from your browser)
- **Edit** – change selection criteria
- **Download** – create a CSV file
- **Delete** – delete the report

Select your report and click the required operation.

Note: We recommend that when downloading the CSV file you save the report to disc rather than opening the file in its current location (when prompted) as your browser may not be able to handle the current file format.

TIP: Output as a downloadable CSV file will enable you to open and the file and import to spreadsheet package like Microsoft's Excel. Remember to Save as a .csv file

14   Appendix A

14.1   CSV File Formats

To upload your product inventory in bulk you will need to create a CSV (comma separated value) file. This is a common output file used by all the market leading spreadsheet programs such as Microsoft Excel and Microsoft Access.

CSV Format (Version 3)

	FIELD NAME	TYPE	LENGTH	DESCRIPTION
A	Product Identifier	Integer		A whole number greater than zero which uniquely identifies an existing product in your inventory. Used only when editing existing products (Optional if not editing)
B	Product Name	Text	1 to 16 Characters	The name of your product. This will name a new product or rename an existing product if you are editing one. (Optional if editing)
C	Product Code	Text	1 To 40 Characters	The code for your new or existing (if editing) product (Optional)
D	Visible to customers	True Or False		If this flag is set to true then the product will be visible to your customers. If set to false then the product will be stored but invisible to your customers. The visibility can be changed at any time by editing a product after it is stored. (Optional if editing)
E	Descriptive Keywords	Text	1 Character Or More	You may enter one or more descriptive keywords for keyword searches within your catalogue. The keywords should be separated by single spaces. (Optional)
F	Short Description HTML Flag	True Or False		If a short description (see below is entered for the product then you may wish to include HTML formatting within it. If so then enter true here otherwise (for plain text) select false.
G	Short Description	Text	Variable Length	This is a short description of your product (which may include optional HTML formatting - see above), which will be displayed on category pages of your site.
H	Long Description HTML Flag	True Or False		If a long description (See below) is entered for the product then you may wish to include HTML formatting within it If so then enter true here otherwise (for plain text) select false (Optional)
I	Long Description	Text	Variable Length	This is a long description of your product (which may include optional HTML formatting - see above), which will be displayed on full product information pages of your site. (Optional)
J	Image Identifier	Integer		A whole number greater than zero, which uniquely identifies an image currently, stored in your database. This image will appear as part of your full product description. (Optional)
K	Thumbnail Image Identifier	Integer		A whole number greater than zero, which uniquely identifies an image currently, stored in your database. This image will appear as part of your short product description. (Optional)

L	Product Weight	Floating Point Number		A number, zero or greater, that denotes the weight of your product - it does not represent a particular unit of weight other than in relation to the other products in your inventory. (Optional if editing)
M	Product Height **(NOT USED)**	Floating Point Number		A number, zero or greater, that denotes the height dimension of your product - it does not represent a particular unit of height other than in relation to the other products in your inventory. (Optional if editing)
N	Product Width **(NOT USED)**	Floating Point Number		A number, zero or greater, that denotes the width dimension of your product - it does not represent a particular unit of width other than in relation to the other products in your inventory. (Optional if editing)
O	Product Depth **(NOT USED)**	Floating Point Number		A number, zero or greater, that denotes the depth dimension of your product - it does not represent a particular unit of depth other than in relation to the other products in your inventory. (Optional if editing)
P	Tax-Rate Group	Integer		A whole number greater than zero, which uniquely identifies a tax-rate group already, stored in your database. (Optional)
Q	Shipping-Cost Group	Integer		A whole number greater than zero, which uniquely identifies a shipping-cost group already, stored in your database. (Optional)
R	Product Discount Scheme	Integer		A whole number greater than zero, which uniquely identifies a discount scheme already, stored in your database. (Optional)
S	Product Instructions	Text	1 Or More	A list of integer values contained in double quotes and separated by commas. Each integer represents a product instruction already stored in your database. (Optional)
T	Product Position	Integer	1 Or More	A whole number that represents the sorting priority for this product when it is displayed in a list of products (1 being the highest). If no value is entered then the default of '500' will be used. (Optional)
U	Variation Identifier	Integer		A whole number greater than zero which uniquely identifies an existing variation in your inventory. You must also have specified the correct product identifier for the product that contains this variation. Used only when editing existing products and variations. (Optional if not editing)
V	Variation Price	Floating Point Number		A number, zero or greater that denotes the price of this variation. (Optional if editing)
W	Variation Description	Text	1 To 40 Characters	This is a description of your variation that will be displayed on the variation information pages of your site. (Optional)
X	Visible To Customers	True Or False		If true then the variation will be visible to your customers and will appear in your catalogue. If false is entered then the variation will be stored but invisible to your customers. The visibility can be changed at any time by editing a variation after it is stored. (Optional if editing)
Y	Use Stock Checking	True Or False		If true is entered then stock checking will be active, if false is entered then stock checking will be inactive. (Optional if editing)
Z	Variation Reorder Level	Integer		A whole number, zero or greater, that denotes the reorder level for the variation. If the stock level falls below the reorder level then you will be advised by the system.

				(Optional if editing)
AA	Variation Initial Stock Level	Integer		A whole number, zero or greater, that denotes the initial stock level for this variation. (Optional if editing)
AB	Hard-Goods Or Downloads	Integer		If set to 1 then the variation represents 'hard-goods', if set to 2 then the variation represents 'Download'. Any other value is erroneous (Optional if editing)
AC	Downloads Identifier	Integer		If downloads have been selected by the flag described immediately above then this identifier references a previously created downloads in your database. (Optional if hard goods editing)
AD	Downloads Access Days	Integer		If the hard/downloads selection flag is set to downloads (see above) then this whole number represents the number of days that the particular item is available to your customers. (See below) (Optional if hard-goods editing)
AE	Downloads Access Hours	Integer		If the hard/downloads selection flag is set to downloads (see above) then this whole number represents the number of hours that the particular item is available to your customers. (Optional if hard-goods editing)
AF	Delivery Flag	True or False		If true is entered then delivery will be active, if false is entered the delivery will be inactive. Downloadable goods default to false. Hard goods default to true.
AG	Variation Discount Scheme	Integer		A whole number greater than zero which uniquely identifies a discount scheme already stored in your database. (Optional)
AH	Variation Instructions	Text		A list of integer values contained in double quotes and separated by commas. Each integer represents a variation instruction already stored in your database. (Optional)
AI	Variation Priority	Integer	1 Or More	A whole number that represents the sorting priority for this variation when it is displayed in a list of products (1 being the highest). If no value is entered then the default of '500' will be used. (Optional)
AJ	Category Identifier	Integer		A whole number greater than zero which uniquely identifies an existing variation in your inventory. You must also have specified the correct product identifier for the product that contains this variation. Used only when editing existing products and variations. (Optional if not editing)
AK	Category Date	Date		A date that represents the start date that this product will appear in the category described above. (Optional)
AL	Category Days	Integer		A whole number greater than zero which uniquely identifies an existing variation in your inventory. You must also have specified the correct product identifier for the product that contains this variation. Used only when editing existing products and variations. (Optional if not editing)

Note: 'Integer' denotes a whole number, 'Floating point number' denotes a value that may have a decimal place and 'Date' denotes a date in the format of YYYYMMDD.

Example CSV Format

,PNAME1,PCODE,true,KEYWORDS,FALSE,S_DESCRIP,FALSE,L_DESCRIP,1,2,100,1,1,1,,,,,500,d135,1,V_DESC
RIP1,true,true,10,100,1,,,,,,,500,1,,10
,,,,,,,,,,,,,,,,,,,1,V_DESCRIP2,true,true,10,100,1,,,,,,,,, (Adding Variant 2)
,,,,,,,,,,,,,,,,,,,1,V_DESCRIP3,true,true,10,100,1,,,,,,,,, (Adding Variant 3)
,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,500,2,,1 (Putting the product into category 2)
,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,500,3,,1 (Putting the product into category 3)
,PNAME2,PCODE,true,KEYWORDS,FALSE,S_DESCRIP,FALSE,L_DESCRIP,1,2,100,1,1,1,,,,,500,,1,V_DESCRIP1
,true,true,10,100,1,,,,,,,500,1,,10
,,,,,,,,,,,,,,,,,,,1,V_DESCRIP2,true,true,10,100,1,,,,,,,500,2,,1 (Adding Variant 2 & putting the product into category 2)
,,,,,,,,,,,,,,,,,,,1,V_DESCRIP3,true,true,10,100,1,,,,,,,500,3,,1 (Adding Variant 3 & putting the product into category 3)
,,,,,,,,,,,,,,,,,,,1,V_DESCRIP4,true,true,10,100,1,,,,,,,500,4,,1 (Adding Variant 4 & putting the product into category 4)
,,,,,,,,,,,,,,,,,,,1,V_DESCRIP5,true,true,10,100,1,,,,,,,500,5,,1 (Adding Variant 5 & putting the product into category 5)

The example clearly indicates that variations can be added to products without the need to repeat any of the initial product details. The additional variations can be added to the product by putting only the variation details into the following line of the CSV file. It also shows that the product can be added to different categories by entering the additional category data into a new row.

> **Note:** To delete any of the products from the Click and Build database simply place a 'D' in front of the product ID number. You can also delete any of the variations from a product, again by just placing a 'D' in front of the variation ID number. When you upload this edited CSV file it will delete all items marked with 'D' from the Click and Build database.

14.2   Warning Messages

Row: 2- Unknown image '72' ------ Your inventory file contained a reference to an unknown image, no image will be stored for the product if this occurs but an image can be selected using the product edit menus.

Row: 2- Unknown thumbnail image '49' ------ Your inventory file contained a reference to an unknown thumbnail image, no thumbnail image will be stored for the product if this occurs but an image can be selected using the product edit menus.

Row: 2- No product weight - defaulting to zero ------ Your inventory file did not specify a weight for the given product and system has therefore chosen to store the product with a weight of zero. If this is inappropriate then use the product edit menu to alter the product weight.

Row: 2- no category matching ID: 4 ------ Your inventory file contained a reference to an unknown category. The product will not be stored within a category and may therefore become an 'orphaned' product - a product that is not a member of any category ('orphaned' products can be located using the 'Orphaned Product Report').

Row:2- bad product-ID ------ Your inventory file contained a product ID that was not an integer value. The system will assume that this was a typing error and will store a new product instead of editing an existing product. If this storage is unsuitable then delete the product from your database.

Row:2- bad variation-ID ------ Your inventory file contained a variation ID that was not an integer value. The system will assume that this was a typing error and will store a new variation instead of editing an existing variation. If this storage is unsuitable then delete the variation from your database.

*Row:2-Product Visibility flag contains unknown val*ue ------ Your inventory file contained a product visibility flag that was neither 'true' nor 'false'. The system will default the product visibility to 'false'.

Row:2- Short-Description HTML flag contains unknown value------ Your inventory file contained a Short-Description HTML flag that was neither 'true' nor 'false'. The system will default the Short-Description HTML flag to 'false'.

Row:2- Long-Description HTML flag contains unknown value------ Your inventory file contained a Long-Description HTML flag that was neither 'true' nor 'false'. The system will default the Long-Description HTML flag to 'false'.

Row:2- bad product tax rate ------ Your inventory file contained a tax-rate identifier that was not a suitable integer - no tax rate will be set.

Row:2- bad product shipping cost ------ Your inventory file contained a shipping cost identifier that was not a suitable integer - no shipping cost will be set.

Row:2- bad product discount ------ Your inventory file contained a product discount identifier that was not a suitable integer - no product discount will be set.

Row:2- bad product instruction ------ Your inventory file contained a product instruction identifier that was not a suitable integer - no product instruction will be set.

Row:2- Un-referenced product instruction: 'BAD-INSTRUCTION' ------ Your inventory file contained a list of product instructions, one of which could not be referenced as an existing instruction. Check the uploaded file and edit the product accordingly.

Row:2- Variation Visibility flag contains unknown value 'BAD' ------ Your inventory file contained a variation visibility flag that was neither 'true' not 'false'. The system will default the flag to 'false' and you may wish to edit the variation and adjust this value.

Row:2- Stock Checking flag contains unknown value 'BAD' ------ Your inventory file contained a stock checking flag that was neither 'true' not 'false'. The system will default the flag to 'false' and you may wish to edit the variation and adjust this value.

Row:2- bad variation reorder level - defaulting to zero 'BAD' ------ Your inventory file contained a variation reorder value that was not a valid integer. The system will default the variation reorder level to zero and you may wish to edit the variation and adjust this value.

Row:2- bad variation initial stock - defaulting to zero 'BAD' ------ Your inventory file contained a variation initial stock value that was not a valid integer. The system will default the variation initial stock level to zero and you may wish to edit the variation and adjust this value.

Row:2- bad variation soft-goods days 'BAD' ------ Your inventory file contained a soft-goods day duration that was not an integer value - no day duration will be stored. You may wish to edit the variation and adjust this value.

Row:2- bad variation soft-goods hours 'BAD' ------ Your inventory file contained a soft-goods day duration that was not an integer value - no day duration will be stored. You may wish to edit the variation and adjust this value.

Row:2- bad variation discount ------ Your inventory file contained a variation discount identifier that was not a suitable integer - no variation discount will be set.

Row:2- bad variation instruction ------ Your inventory file contained a variation instruction identifier that was not a suitable integer - no variation instruction will be set.

Row:2- Un-referenced variation instruction: 'BAD-INSTRUCTION' ------ Your inventory file contained a list of variation instructions, one of which could not be referenced as an existing instruction. Check the uploaded file and edit the variation accordingly.

Row:2- no category matching ID: 32 ------ Your inventory file contained a category identifier that does not match any currently stored in the database. The product will not be stored in any category at this point. You may wish to edit the product and adjust this value.

Row:2- bad category duration 'BAD' ------ Your inventory file contained a category duration that is not a valid integer number. No duration will be stored so you may wish to edit the product and adjust this value.

15 Appendix B

15.1 International Clothes Sizes

These tables may assist you when entering your products into the Click and Build catalogue.

Men's Shoes

British	6	7	8	9	10	11
American	7	8	9	10	11	12
European	39.5	40.5	41.5	42.5	43.5	44.5

Women's Shoes

British	3	4	5	6	7	8
American	4.5	5.5	6.5	7.5	8.5	9.5
European	35	36	37	38	39	40

Women's Dresses, Coats and Blouses

British	10	12	14	16	18	20
American	8	10	12	14	16	18
French	40	42	44	46	48	50
Italian	44	46	48	50	52	54
German	36	38	40	42	44	46

Men's Suits

British	34	36	38	40	42	44
American	Same					
European	44	46	48	50	52	54

Men's Shirts

British	14	14.5	15	15.5	16	16.5	17
American	Same						
European	36	37	38	39	40	41	42

Socks

British	9.5	10	10.5	11	11.5	12	12.5
American	Same						
European	38-39	39-40	40-41	41-42	42-43	43-44	44-45

16   Appendix C

16.1   International Dialing Codes

These dialling codes and time zones may assist you when entering your telephone number into Personal Details. To find out the time difference between your time zone and another country subtract one time from the other.

Country	Int Dial Code	Hours difference from GMT / Universal Standard Time
Afghanistan	93	+4 1/2
Albania	355	+1
Algeria	213	+1
Andorra	376	+1
Angola	244	+1
Anguilla	1 809	-4
Antarctic Australian Territory	672	+4 1/2 +10
Antigua and Barbuda	1 809	-4
Antilles	599	-4
Argentina	54	-3
Armenia	374	+4
Aruba	297	-4
Ascension Island	247	0
Australia	61	+8 +10
Austria	43	+1
Azerbaijan	994	+1
Azores	351	-1
Bahamas	1809	-5
Bahrain	973	+3
Bangladesh	890	+6
Barbados	809	-4
Belarus	375	+2
Belgium	32	+1
Belize	501	-6
Belize	229	+1
Bermuda	1 809	-4
Bhutan	975	+6
Bolivia	591	-4
Bosnia Herzegovina	387	+1
Botswana	267	+2
Brazil	55	-3
Brunei Darussalam	673	+8
Bulgaria	359	+2
Burkina Faso	226	0
Burundi	257	+2
Cambodia	855	+7
Cameroon	237	+1
Canada	1	-3 1/2 - 8
Cape Verde Islands	238	-1
Cayman Islands	1 809	-5
Central African Republic	236	+1
Chad	235	1

Chile	56	-4
China	86	+8
Christmas Island	672	+7
Cocos Island	672	+6 1/2
Columbia	57	-5
Comoros	269	+3
Congo	242	+1
Cook Islands	682	+10 1/2
Costa Rica	506	-6
Cote d'Ivorie	225	0
Croatia	385	+1
Cuba	53	-5
Cyprus	357	+2
Czech Republic	42	+1
Denmark	45	+1
Djibouti	253	+3
Dominica	1 809	-4
Dominican Republic	1 809	-4
Ecuador	593	-5
Egypt	20	+2
El Salvador	503	-6
Equatorial Guinea	240	+1
Eritrea	291	+3
Estonia	372	+2
Ethiopia	251	+3
Falkland Islands	500	-4
Faro Islands	298	0
Fiji	679	+12
Finland	358	+2
France	33	+1
French Guiana	594	-3
French Polynesia	689	+10
Gabon	241	+1
Gambia	220	0
Georgia	7 & 995	+4
Germany	49	+1
Ghana	233	0
Gibraltar	350	+1
Greece	30	+2
Greenland	299	-3
Grenada	1 809	-4
Guadeloupe	590	-4
Guam	671	-10
Guatemala	502	-6
Guinea	224	0
Guinea - Bissau	245	0
Guyana	592	-3
Haiti	509	-5
Honduras	504	-6
Hong Kong	852	+8
Hungary	36	+1
Iceland	354	0
India	91	+5 1/2
Indonesia	62	+7 +8
Iran	98	+3 1/2

Iraq	964	+3
Ireland Republic of	353	0
Israel	972	+2
Italy	39	+1
Ivory Coast see Cote d'Ivoire	225	0
Jamaica	1 809	-5
Japan	81	+9
Jordan	962	+2
Kazakhstan	7	+5 +6
Kenya	254	+3
Kirghizstan	7	+3
Kiribati	686	+12
Korea (North)	850	+9
Korea (South)	82	+9
Kuwait	965	+3
Laos	856	+7
Latvia	371	+2
Lebanon	961	+2
Lesotho	266	+2
Liberia	231	0
Lybia	218	+1
Liechtenstein	41 75	+1
Lithuania	370	+2
Luxembourg	352	+1
Macao	853	+8
Macedonia	389	+1
Madagascar	261	+3
Malawi	265	+2
Malaysia	60	+8
Maldives	960	+5
Mali	223	0
Malta	356	+1
Marshall Islands	692	+12
Martinique	596	-4
Mauritania	222	0
Mauritius	230	+4
Mayotte	269	+3
Mexico	52	-6 - 8
Micronesia	691	+11
Moldavia	373	+2
Monaco	33 93	+1
Mongolia	976	+8
Monserrat	1 809	-4
Morocco	212	0
Mozambique	258	+2
Myanmar (Burma)	95	+6 1/2
Namibia	264	+2
Nauru	674	-12
Nepal	977	+5 3/4
Netherlands (Holland)	31	+1
Netherlands Antilles	599	-4
New Caledonia	687	+11
Nicaragua	505	6
Niger	227	+1
Nigeria	234	+1

Norway	47	+1
Oman	968	+4
Pakistan	92	+5
Panama	507	-5
Papua New Guinea	675	+10
Paraguay	595	-4
Peru	51	-5
Philippines	63	+8
Pitcairn Island	649	-8 1/2
Poland	48	+1
Portugal	361	+1
Puerto Rico	1 809	-4
Qatar	974	+3
Romania	40	+2
Russia	7	+2 1/2 +10
Rwanda	250	+2
St Helena	290	0
St Kitts and Nevis	1 809	-4
Samoa (USA)	685	-11
Samoa Western	685	-11
San Marino	378	+1
Saudi Arabia	966	+3
Senegal	221	0
Seychelles	248	+4
Sierra Leone	232	0
Singapore	65	+8
Slovakia	42	+1
Slovenia	386	+1
Solomon Islands	677	-11
Somalia	252	+3
South Africa	27	+2
Spain	34	+1
Sri Lanka	94	+5 1/2
Sudan	249	+2
Surinam	597	+3
Swaziland	268	+2
Sweden	46	+1
Switzerland	41	+1
Syria	963	+2
Taiwan	886	+8
Tajikistan	7	+5
Tanzania	255	+3
Thailand	66	+7
Togo	228	0
Tonga	676	-13
Trinidad & Tobago	1 809	-4
Tunisia	216	+1
Turkey	90	+2
Turkmenistan	7	+5
Turks & Calicos	1 809	-5
Tuvalu	688	-12
Uganda	256	+3
Ukraine	380	+2
United Arab Emirates	971	+4
United Kingdom	44	0

Uruguay	598	-3
USA	1	-5 -11
Uzbekistan	7	+5 +6
Vanuatu	678	-11
Venezuela	58	-4
Vietnam	84	+7
Virgin Islands (UK)	1 809 49	-4
Virgin Islands (US)	1 809	-4
Yemen	967	+3
Yugoslavia	381	+1
Zaire	243	+1
Zambia	260	+2
Zimbabwe	263	+2

17   Appendix D

17.1   Useful Web Sites

Listed below are some web sites that you may find useful when building your store:

http://www.netscape.com/
Where the latest Netscape browsers can be downloaded.

http://www.microsoft.com/
Where the latest Internet Explorer browsers can be downloaded.

http://www.winzip.com/
Where the Zip file compression and archiving software can be purchased and downloaded.

http://www.vertexinc.com/TaxCybrary/default.asp
Information for American users of Click and Build on the latest taxation rules for Internet trading, state by state.

18   Appendix E

18.1   Text and Background Colours

Alice Blue	Antique White	Aqua	Aquamarine	Azure	Beige	Bisque	Black	Blanched Almond	Blue
Blue Violet	Brown	Burlywood	Cadet Blue	Chartreuse	Chocolate	Coral	Cornflower Blue	Corn Silk	Crimson
Cyan	Dark Blue	Dark Cyan	Dark Golden Rod	Dark Grey	Dark Green	Dark Khaki	Dark Magenta	Dark Olive Green	Dark Orange
Dark Orchid	Dark Red	Dark Salmon	Dark Sea Green	Dark Slate Blue	Dark Slate Grey	Dark Turquoise	Dark Violet	Deep Pink	Deep Sky Blue
Dim Grey	Dodger Blue	Fire Brick	Floral White	Forest Green	Fuchsia	Gainsboro	Ghost White	Gold	Golden Rod
Grey	Green	Green Yellow	Honeydew	Hot Pink	Indian Red	Indigo	Ivory	Khaki	Lavender
Lavender Blush	Lawn Green	Lemon Chiffon	Light Blue	Light Coral	Light Cyan	Light Golden Rod Yellow	Light Green	Light Grey	Light Pink
Light Salmon	Light Sea Green	Light Sky Blue	Light Slate Grey	Light Steel Blue	Light Yellow	Lime	Lime Green	Linen	Magenta
Maroon	Medium Aquamarine	Medium Blue	Medium Orchid	Medium Purple	Medium Sea Green	Medium Slate Blue	Medium Spring Green	Medium Turquoise	Medium Violet Red
Midnight Blue	Mint Cream	Misty Rose	Moccasin	Navajo White	Navy	Old Lace	Olive	Olive Drab	Orange
Orange Red	Orchid	Pale Golden Rod	Pale Green	Pale Turquoise	Pale Violet Red	Papaya Whip	Peach Puff	Peru	Pink
Plum	Powder Blue	Purple	Red	Rosy Brown	Royal Blue	Saddle Brown	Salmon	Sandy Brown	Sea Green
Seashell	Sienna	Silver	Sky Blue	Slate Blue	Slate Grey	Snow	Spring Green	Steel Blue	Tan
Teal	Thistle	Tomato	Turquoise	Violet	Wheat	White	White Smoke	Yellow	Yellow Green

19   Appendix F

19.1   CSV Shipping Rates Upload

CSV Rates Upload enables you to set up an infinitely flexible table of shipping charges.

There are two types of CSV format, **Range** and **Each**. If your shipping charge rate is by **Range** you will be setting prices for ranges of quantities. E.g. 1-5 units will add £10 to the total of the shipping charge and 6-10 units will add £18 to the total and so on. If your shipping charge is by **Each** you will be setting prices on a per unit basis for ranges of quantities. E.g. 1-5 units will add £10 each to the total of the shipping charge and 6-10 units will add £18 each to the total and so on.

> **Tip**: It is also possible to type the rate variations directly online into the Rate field as: 5=10; 10=18; 20=30; *=35. (NB: * means any value 35 and above).

The format of the CSV file is simply two columns as shown in the examples below.

UNIT

CSV Data Format		Resulting Shipping Charge for Unit Rate Type - Range
5	10	1-5 units will add £10 (total) to the shipping charge
10	18	6-10 units will add £18 (total) to the shipping charge
20	30	11-20 units will add £30 (total) to the shipping charge
*	35	21 and more units will add £35 (total) to the shipping charge

Direct Input format: 5=10;10=18; 20=30;*=35

CSV Data Format		Resulting Shipping Charge for Unit Rate Type - Each
each		Each modifier changes the calculation
10	18	1-10 units will add £18 (per unit) to the shipping charge
20	30	11-20 units will add £30 (per unit) to the shipping charge
*	35	21 and more units will add £35 (per unit) to the shipping charge

Direct Input format: each= ;10=18; 20=30;*=35

WEIGHT

CSV Data Format		Resulting Shipping Charge for Weight Rate Type - Range
5	10	1-5 measures of weight will add £10 (total) to the shipping charge
10	18	>5-10 measures of weight will add £18 (total) to the shipping charge
20	30	>10-20 measures of weight will add £30 (total) to the shipping charge
*	35	>20 and more measures of weight will add £35 (total) to the shipping charge

Direct Input format: 5=10;10=18; 20=30;*=35

CSV Data Format		Resulting Shipping Charge for Weight Rate Type - Each
each		Each modifier changes the calculation
10	18	0-10 measures of weight will add £18 (per measurement) to the shipping charge
20	30	>10-20 measures of weight will add £30 (per measurement) to the shipping charge
*	35	>20 measures of weight will add £35 (per measurement) to the shipping charge

Direct Input format: each= ;10=18; 20=30;*=35

VALUE %

CSV Data Format		Resulting Shipping Charge for Value %age Rate Type - Range
5	10	%10 (total) will be added for goods up to £5
10	18	%18 (total) will be added for goods between £5 and £10
20	30	%30 (total) will be added for goods between £10 and £20
*	35	%35 (total) will be added for goods over £30

Direct Input format: 5=10;10=18; 20=30;*=35

CSV Data Format		Resulting Shipping Charge for Value %age Rate Type - Each
each		Each modifier changes the calculation
10	18	%18 (each) will be added for goods up to £10
20	30	%30 (each) will be added for goods between £10 and £20
*	35	%35 (each) will be added for goods over £30

Direct Input format: each= ;10=18; 20=30;*=35

20 Appendix G

20.1 The Benefits of Click and Build

Click and Build does not require any technical knowledge whatsoever and is the easiest and quickest way to get online with a professional store.

It is simple to set-up and easy to operate. With automatic integration to WorldPay you can take online payments automatically and manage the telephone orders generated by your web site.

Below is a list of the key features that make up Click and Build version 5.0.

20.1.1 General Features

- **Click and Build provides <u>everything</u> –** So you do not have to concern yourself with any other web hosting, maintenance, hardware or software.
- **Immediate access –** All you require is access to the web and a browser (no software downloads).
- **Easy to use with existing web sites –** If you already have a web site use Click and Build to run your inventory and shopping cart – <u>no amendments</u> necessary.
- **Fully integrated payment processing** – Through WorldPay's secure payment systems.
- **Real time notification of sales** – You get immediate email notice of your sales.
- **Automatic emails to customers –** Sent to confirm <u>orders</u> after the transaction is processed and <u>shipping</u> after dispatch (optional).
- **Fully flexible reporting –** You determine content and timing e.g. daily sales report.
- **Simple to manage –** Adding new products, stock and price changes can be completed in minutes with professional looking results.
- **No need for HTML –** You do not need knowledge of any web building languages to guarantee professional results (but HTML can be included if required).
- **Already have your own designer –** Then work with the Click and Build team to deliver a bespoke professional solution e.g. www.directusbstore.com
- **Email your customers anytime –** Sending offers and newsletters is easy, all details are collected and can be generated in a report for mailing purposes.
- **Multi-currency** – Shoppers can choose to shop in their own currency. Exchange rates are updated automatically each day
- **100's of pre-built templates –** Build your store in minutes using 100's of pre-built templates and designs, or tell us what you want and our designers will build a bespoke online store that you can manage.
- **Intuitive and easy to use** – Makes it a pleasure to develop both simple and complex online businesses.
- **Extra web pages** – Unlimited user defined web pages.
- **Build and View** – The store build and shoppers view are separated for clarity.

20.1.2 Store Building features

- **Text and HTML** – Write store pages using straightforward text (to <u>include images),</u> or write more complex pages using HTML (optional).

- **Downloadable Goods** – Add software, video, images, music, documents or any other form of software-based product for your shoppers to purchase and download.

- **Discounts** – Specify as many variations of discount as you need, based on percentage discount on set order value, free delivery on set order value, or other offers such us 3 for the price of 2.

- **Inventory Control** – Automatically updates stock levels and sends you an email when any item falls below your pre-set minimum.

- **Full Reporting** – Produce almost any report using the comprehensive and easy to use report generator.

- **Nested Product Categories** – If your store has a large inventory you can expand the category, product (and product variations) structure to include unlimited parent/child categories.

- **Sorting** - Assign sort priorities to categories, products, product variations and instructions in order to present your preferred products (and related information) to your shoppers first.

- **Multi-user** – Define as many administrative users as you need and control their access to various parts of your store administration.

- **News Pages** – News articles can be produced and linked to/from a product within your store.

- **Guest Book -** Enables shoppers to leave comments. The comments can be vetted before making them visible to other shoppers.

- **Statistics** - See the status of your store. Easily check order activity and resource usage.

- **CSV Uploads** – Products and complex shipping data can be uploaded via CSV files.

- **CSV Downloads** – Generate CSV output to update spreadsheets if required.

- **International Tax and Shipping** – An easy to use interface helps you enter the information Click and Build requires to provide automatic calculation of cross border tax rates and shipping costs.

20.1.3 Shopper Features

- **Currency** - Shoppers can select their preferred currency. All prices will be displayed in that currency with no additional exchange charges added later.

- **Language** - Shoppers can select their preferred language for using the Click and Build Store Interface.

- **Instructions** – Shoppers can make choices (e.g. select colour, sizes etc) and give text input throughout the store.

- **Order Progress** – Shoppers can receive an email confirming payment clearance (from WorldPay), plus order acceptance and goods dispatch from you. Click and Build also enables shoppers to query the status of their order on-line.

21   Appendix H

21.1   Glossary of WorldPay Terms

A

Account ID
The unique reference for each of a customer's accounts on WorldPay's *Select Database*.

Activation Request Form (ARF)
URL: https://secure.worldpay.com/app/arf.pl?brand=somethingfour
Form that the customer submits to the *Technical Support* Team when they are ready to go live.

Agent Number
Assigned by the bank. WorldPay's reference number with the bank.

AMEXC
American Express Customer

ARF
See *Activation Request Form (ARF).*

Authorisation
A process where the transaction is approved.

B

Bank Compliance form
The customer must complete this document and get it stamped by his bank to confirm his business details. It is a requirement of the customer acceptance process.

C

Callback password
The password relating to a *callback URL*.

Callback URL
The customer can set up a callback URL on the *Customer Management System (CMS)*. This URL can be used for payment responses that are displayed to his shoppers. The customer can set up the callback URL and password by clicking on the `Configuration Options' button for the required installation at the Home page on the CMS.

Card issuer
See *issuer*.

Card scheme
Mastercard, Visa or Switch.

Card scheme rules and regulations
Operating rules set by the card schemes to which all member banks must comply.

Cardholder
See *shopper*.

'Cardholder not present' transactions

Transactions that are processed via telephone or the Internet. The merchant does not have sight of the card or of the cardholder's signature.

Chargeback

A transaction dispute procedure, initiated by a cardholder/shopper, which may result in a debit being applied to the customer's account.

Chargeback Guide

A document describing what happens when a chargeback is raised on a WorldPay Direct customer. It provides support to the customer in deciding whether to process the transaction in question or make inquiries as to the identity of the cardholder.

Click and Build

WorldPay's multi-currency and multilingual online shopping system and catalogue builder.

Code 10 call

An authorisation check made by an *issuer*, where a customer is suspicious about a transaction.

Collection assistance

A `Please can you help' type of letter sent by one card scheme member to another.

Company ID

A unique reference for a customer on the *Select Database*. Also known as *WorldPay Company ID (WCID)* .

Company number

Assigned by the acquiring bank. A way in which the bank identifies a merchant on their system.
NatWest: 6 digit unique number
Midland: 6 or 7 digit unique number
Barclays: same as *Terminal ID (TID)*. 8 or 16 digit number

Completion

See *deferred processing*. Once a supplier is satisfied that a
'pre-authorised' transaction should go ahead, he 'completes' the transaction.

Continuous authority transaction (Mastercard and Visa only)

A transaction for which a cardholder grants written permission to a customer to periodically charge their account number for recurring goods or services (for example, club membership or magazine subscription).

Customer

A business that is using WorldPay to facilitate the selling of its products/services: For example, ISPs who host Click and Build or internet *store-owner* s.

Customer Acceptance

Email: acceptance@worldpay.com (All Customer Acceptance)
EMEA. applications@worldpay.com (UK CA Team)
The Customer Acceptance Team receives the customer's initial application form. Once the customer's web site is live, they also check any changes he wishes to make, ensuring he adheres to any agreements he has signed with us. Occasionally, they run random checks on his web site to ensure it conforms to all agreements.

Customer Management System (CMS)

URL:https://select.worldpay.com/wcc/admin - A tool for WorldPay customers to manage their WorldPay accounts. Previously known as MAMS or WAS.

Customer Procedures Guide

Aimed at customer/customer's integrator who is integrating with the WorldPay payment service.

The document explains how the customer's WorldPay account is set up and how to carry out various administrative procedures.

Customer Support - Click and Build

Web: http://www.clickandbuild.com

Web: www.something4.com
Email: support@clickandbuild.com

Email: design@clickandbuild.com

Tel: 0906 712 0304 (charged at 50p per min)

Available: 9.00am to 5.30pm, Monday to Friday

Customer Support – WORLDPAY queries only
Email: customerservices@worldpay.com

Telephone: +44 (0) 870 742 7002

Available:0700 to 2300 GMT (every day)

Provide (non-technical) support to customers. The Customer Service Team can offer help with any issue to do with WorldPay's services. You should direct technical queries to the Technical Support Team. See also *Customer Support* and *Technical Support*.

D

Deferred processing
 A facility available through WorldPay which allows the supplier to:

Check a shopper's credentials/creditworthiness before providing the goods or services.

Identify duplicate transactions before they are sent through to the banks for processing.

Once the supplier is satisfied that the transaction should go ahead, he `completes' the transaction.

Direct Debit Authority form
UK customers must fill out a direct debit authority, so that WorldPay can debit any fees that are due (for example the annual set-up fee).

E

Expired card
A card on which the embossed, encoded, or printed expiry date has passed.

F

Fulfilment
A document image that NatWest supplies in response to a Request for Information.

FuturePay
A WorldPay product, which enables both fixed amount (standing-order-like) contracts and variable amount (direct-debit-like) contracts with infinitely flexible permutations on possible constraints. It need not involve any initial payment, and the amount and timing of payments may vary.

G

GoldMine
Customer relationship management software.

Gold ID

A unique reference on the GoldMine system. For customers, this will usually be the same as their *Company ID*.

Good Faith

A 'Please can you help' type of letter sent by one card scheme member to another.

I

In real time

Instantaneously, immediately

Installation ID

The unique reference number assigned by WorldPay for a particular Select installation. The customer includes this is the number in his payment form. The customer will probably have two installation IDs; one for live and one for testing.

Integration Guide

The technical guide that helps a customer to set up his Shopping System to use the WorldPay Internet payment mechanism. He can view or download this document when he has paid for WorldPay.

Internet-trader

Individual or company who owns an internet site from which products/goods can be purchased.

Intershop

A method of integrating with WorldPay.

Issuer

Also known as *issuing bank*, *card issuer*. A member bank that issues cards and whose name appears on the card.

Issuing bank

See *issuer*.

L

Live Server

The secure server onto which *Technical Support* transfers your payment page files to make them live.

Login password

The password used by a customer or a shopper to access the *Customer Management System (CMS)* or the *Shopper Management System (SMS)*.

M

MAMS

Old name for the *Customer Management System (CMS)*.

Member

An organisation (usually a bank) which is a signed up to operate within the terms of the card scheme.

Merchant (1)

An individual or company approved to accept a credit or bank card.

Merchant (2)

Obsolete way to describe an individual or company who is using WorldPay to facilitate the selling of its products/services on its internet site. These individuals or companies are now known as *customer* s.

Merchant Number

See *Outlet ID/Number*.

Merchant Service Charge (MSC)
The charge levied on a transaction by the acquiring bank.
 See also *Transaction Service Charge (TSC)*.

Multi-currency transaction
Transaction where the currency in which the shopper makes payment may differ to the currency in which the customer receives payment. Enables shoppers to purchase goods and services in a currency that they recognise and understand. The customer can offer goods in over 160 currencies and receive payment in any of 22 currencies.

N

NDC
National Data Corporation

NDCC
NDC Acquired Customer

NWAC
NatWest Acquired Customer

O

OBAC
Other Bank Acquired Customer

Outlet ID/Number
Also referred to as *Merchant Number*. Assigned by the acquiring bank. A way in which the bank identifies a merchant on their system. There is one outlet number for each of the merchant's remittance currencies.
NatWest: 8 digits. Also known as *Streamline ID/Number*.
Midland: 15 digits
Barclays: 7 digits

P

Password
Could be *login password*, or *callback password*.

Partner
See *WorldPay Partner*

Partner ID
The *Company ID* for a partner.

PC-EFT
Shortly to be replaced by *WP-EFT (WorldPay Electronic Funds Transfer)*.
A software package that enables the authorization and processing of `cardholder not present' transactions to the relevant acquiring bank. In order for merchants to process transactions via WorldPay, they have to be entered onto the PC-EFT system.

Post-authorisation
See *pre-authorisation*.

Pre-authorisation
A transaction that verifies if there are sufficient funds on the card. The amount of the transaction is held for a period not longer than 30 but as short as 7 days. The post authorization transaction actually charges the account and pays the merchant.

R

Real time
See *in real time*.

Refund
 when the customer returns funds for a transaction to a shopper.

Remittance
The funds that WorldPay pays to the customer.
For customers offering WorldAccount: Transactions are remitted to the customer's bank account each Wednesday, 4 weeks in arrears. Bank Transfer Charges, Refunds and WorldPay's TSC are calculated and deducted before remittance occurs.
For WorldDirect customers: Transactions are remitted to the customer's bank account each Wednesday, 4 weeks in arrears (1 week in arrears for customers domociled in the USA or Canada). Bank Transfer Charges, Refunds and WorldPay's TSC are calculated and deducted before remittance occurs.
For NatWest Acquired customers: Transactions are remitted to the customer's bank account 3 to 5 working days after the transaction was made. If the customer is set up to process sterling transactions only, NatWest debits the agreed MSC from the customer's bank account each month. If the customer is set up for multi-currency processing, NatWest collects the MSC before remittance.
For Other Bank Acquired customers: Transactions are remitted to the customer's bank account 3 to 5 working days after the transaction was made. The acquiring bank debits the agreed MSC from the customer's bank account each month.

Remittance currencies
The currencies in which the customer can accept payment from WorldPay and into which foreign currency payments are converted. The customer must have an account for each remittance currency before applying. There are 22 remittance currencies.

Request for Information (RFI)
A request from the cardholder's issuing bank for copies of a signed sales receipt or other suitable documentation to prove the validity of a transaction.

Risk
The former name for *Customer Acceptance*.

S

Select Checkout
Plain text (via HTTP) integration method. Used by the majority of customers for simple integration with the Select Gateway.
Select Checkout lets the customer have multilingual and configurable payment pages, but does not offer "WorldAccount". Checkout allows the customer to have repeat billing, a delivery address and callbacks. To integrate with Select Checkout the customer needs knowledge of HTML forms. No scripts need to run on the customer's server.

Select Database
The main transaction and reporting database underlying the Select Gateway.

Select Gateway
The web-facing service for capturing payment information.

Settlement
See *remittance*.

Shop@ssistant
A method of integrating with WorldPay.

Shopper
A cardholder who is buying a customer's products/services. See also *customer*.

Shopper Management System (SMS)
URL: https://select.worldpay.com/wcc/admin
A tool for WorldPay shoppers to manage their WorldPay accounts.

Single currency transaction
Transaction where the payment currency is the same for both the shopper and the customer. Developed to satisfy the demands of companies wishing to transact electronic commerce solely in their own country. WorldPay support 22 single currency options.

SMS
See *Shopper Management System (SMS)*.

Split sale
Where a customer has processed two or more transactions that in total exceed his floor limit, to avoid having to obtain a single authorization for the combined total.

Staging Server
Accessible to customers using *Select Checkout*, *Intershop* or *Shop@ssistant*. The server to which the customer must move his payment page files (from his local machine) so that *Technical Support* can transfer them to the *Live Server*.
His area on the Staging Server is username.staging.worldpay.com.

Store-builder
An individual or company who builds internet sites from which products/goods can be purchased.

Store-owner
An individual or company who owns an internet site from which products/goods can be purchased.

Streamline ID/Number
See also *Outlet ID/Number* and *Merchant Number*. An 8-digit number assigned by NatWest that identifies a merchant on their system. There is one Streamline number for each of the merchant's remittance currencies.

Supplier
Another term for *customer*.

Support
Could be Customer Support or Technical Support.

T

Technical Support
See also *Support* and *Customer Support*.

The Technical Support Team have four functions:
Integration - they set up the WorldPay computers to accept the customer's payment pages, once he has been accepted by *Customer Acceptance*.
Testing - they check the customer's site at the testing stage to ensure there are no technical or operational errors before it goes live. They will inform the customer of any errors and may be able to advise as to how to correct them.
Activation - they are responsible for making the customer's web site live. Upon receipt of the customer's *Activation Request Form (ARF)* and after approval from *Customer Acceptance*, they will activate the customer's site.

General Support - The Technical Support Team deal with technical queries the customer may have during the integration of his site with WorldPay.

Asia Pacific Technical Support
Email: support@aisapac.worldpay.com

UK Technical Support
Email: support@uk.worldpay.com
Fax:+44 (0) 870 742 7009
Available:0700 to 2100 GMT, Monday to Friday
0900 to 1500 GMT, Saturday and Sunday

US Technical Support
Email:support@usa.worldpay.com

Terminal ID (TID)
This number is assigned by a bank and is the virtual equivalent of a PDQ machine. A TID is assigned for each of a customer's remittance currencies.

Transaction currencies
The currencies in which a shopper pays for goods/services on your web site. There are over 160 transaction currencies.

Transaction Service Charge (TSC)
The charge levied on a transaction by WorldPay. See also *Merchant Service Charge (MSC)*.

U

User ID
A unique numeric reference for a user of the *Customer Management System (CMS)* or of the *Shopper Management System (SMS)*. The user probably never needs to know his user ID.

Username
The name used by a customer to access the *Customer Management System (CMS)* or by a shopper to access the *Shopper Management System (SMS)*.

V

Virtual terminal
An integration with WorldPay from the customer's back office, where the customer can type in payments directly, instead of using a credit card terminal.

W

WAC
WorldAccount Customer

WAS
See *WorldPay Administration Server (WAS)*.

WorldAccount
An additional option for WorldPay customers who are using Select Pro or Select Junior. A WorldAccount allows the shopper to make low value purchases in the lowest denomination of up to 22 currencies. The shopper sets up a virtual account with WorldPay, a WorldAccount, in the currency of his choice and "loads" his account using a credit or debit card. With his WorldAccount username and password, he can then buy goods and services from participating customers in his preferred currency.

WorldDirect

A fully approved customer acquisition solution for processing credit and debit cards, which operates in over 125 countries.

WorldPay Administration Server (WAS)

The server on which the *Customer Management System (CMS)* and the *Shopper Management System (SMS)* reside.

WorldPay Company ID (WCID)

The unique number that is given to the customer when he first applies to use WorldPay. This number identifies the customer on WorldPay's database. It stays with the customer for as long as he is a WorldPay customer.

WorldPay Customer Agreement

The agreement that the customer signs when accepted as a WorldPay customer. Both the customer and WorldPay hold a copy of this agreement.

WorldPay Customer Reference (WCR)

Old term for *WorldPay Company ID (WCID).*

WorldPay Internal Admin Server

URL:https://wcc.select.worldpay.com/wcc/wpadmin
The internal customer administration system for creating new companies, accounts, installations, etc.

WorldPay Partner

WorldPay Accredited Partner

Can offer their shoppers the full range of WorldPay products, enhance their team skills through training and support and earn attractive rewards for recruitment and ongoing business. They also benefit from aggressive marketing programmes, comprehensive marketing support material and campaign funding.

WorldPay Affiliate Partner

Can offer their shoppers the full range of WorldPay products, enhance their skills through training and support, and earn attractive rewards for recruiting new shoppers.

WorldPay Select

Transaction Management Service. Select is the middleware between the customers' web sites and the bank gateway. It is used to capture, store and report on data submitted to WorldPay. The "products" we offer to customers are really just the methods by which they can integrate with the Select service.

WPDC

WorldDirect Customer

WP-EFT (WorldPay Electronic Funds Transfer)

A software package, which enables the authorization and processing of '*cardholder not present' transactions* to the relevant acquiring bank.
In order for merchants to process transactions via WorldPay, they have to be entered onto the WP-EFT system.

22   Contact Details

Information Email:	info@clickandbuild.com
Support Email:	support@clickandbuild.com
Design Email:	design@clickandbuild.com
Web site:	http://www.clickandbuild.com/
Company Web site:	http://www.something4.com
Support/Design Telephone:	0906 712 0304 (Charged at 50p per min)
Sales Telephone:	0845 7123 5622